

Stage Four – Set Billing Address

1. The default or primary address type will display in the **A/Type** (address type) field for the bill.
2. Select a different **A/Type** if required.
3. Click **Next** to proceed to the next step of the wizard.

Stage Five – Submit, authorise and post the bill

This is the final stage of the Billing Wizard.

From this stage you can authorise and post a bill. The feature is only available if you have appropriate security rights. Alternatively you can click on the **Finish** button in the Billing Wizard and save the bill as a draft bill.

Services	15,000.00
Tax	1,500.00
Total	16,500.00


SUBMIT A DRAFT BILL

Once a draft bill is complete, it needs to be submitted for authorisation.

Draft bills can be listed in various ways:


- From the **Bills** tab on the **Client** or **Assignment** page
- From the **Bills** approval list on the Homepage
- From **Billing** ▶ **Draft Bills** on the menu

To submit a bill for authorisation:

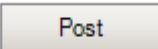
1. Open the required bill from the **Bills** list.
2. Click the **Submit**  button from within the page.

AUTHORISE AND POST A SUBMITTED BILL

To authorise an individual bill:

1. Open submitted draft bill or select it from the **Bills** approval list on the Homepage.
Note: If this Homepage is not available, go to your Personal Homepage. Right-click on the **WIP Approval** view and select the **Bills to Approve** option.
2. Click the green **Authorise**  button available within the page.

To post an individual bill:

1. Open the authorised bill.
2. Click the  button available within the page.

STANDARD BILLING

Quick Reference Guide



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
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DRAFTING A BILL USING THE WIZARD

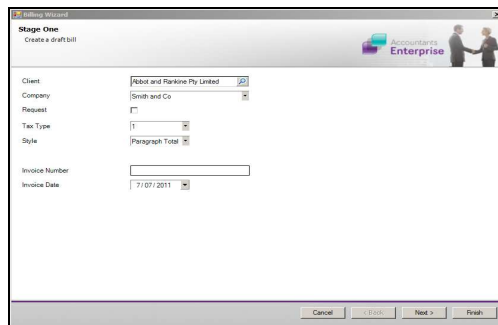
Start the Billing Wizard

You can start the Billing Wizard from a number of locations including:

- **Billing**  icon (drop down menu)
- The **Client** page
- The **Find Clients** page
- **Aged WIP** page

1. Select **Billing wizard** from the Task bar to open the **Stage One - Create a Draft Bill** window.

Stage One – Create a Draft Bill



The screenshot shows the 'Billing Wizard - Stage One' window. It contains the following fields and options:

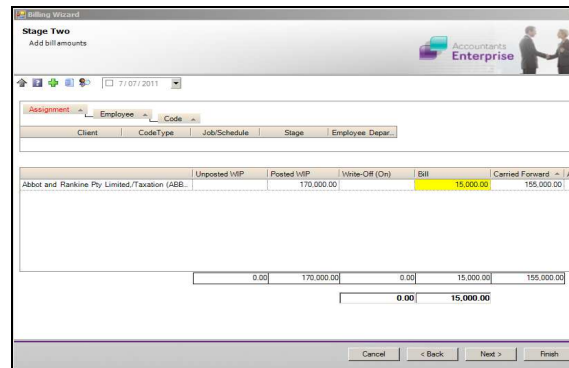
- Client:** [Abbot and Rankine Pty Limited] (dropdown)
- Company:** [Smith and Co] (dropdown)
- Request:**
- Tax Type:** [1] (dropdown)
- Style:** [Paragraph Total] (dropdown)
- Invoice Number:** [] (text field)
- Invoice Date:** [7/07/2011] (dropdown)

Buttons at the bottom: Cancel, < Back, Next >, Finish.

1. Type or select the appropriate details for the following:
 - **Company** (if not prefilled)
 - **Invoice number** -leave this field empty as the system will allocate the number
 - **Invoice Style** -select the relevant style
 - **Invoice Date**
2. Click **Next** to proceed to the next step of the wizard.

Stage Two – Add Bill Amounts

1. To bill by assignment, click on the **Assignment** heading and drag it to the top. You can also bill (group by) client or employee or task.
2. Click on the field in the **Bill** column for the relevant assignment and enter the amount to be billed against the assignment (excluding GST).



The screenshot shows the 'Billing Wizard - Stage Two' window. It features a table with columns: Assignment, Employee, Code, Client, CodeType, Job/Schedule, Stage, Employee, Depar. Below the table is a summary table:

Unposted WIP	Posted WIP	Write-Off (On)	Bill	Carried Forward
	170,000.00		15,000.00	155,000.00
0.00	170,000.00	0.00	15,000.00	155,000.00
			0.00	15,000.00

Buttons at the bottom: Cancel, < Back, Next >, Finish.

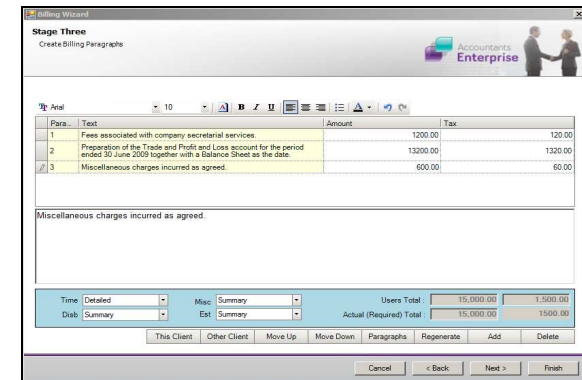
3. Click **Next** to proceed to the next step of the wizard.

Notes:

- You can either double-click to prefill the total amount of WIP outstanding or type in the amount.
- You can right-click on an amount line to display a menu containing a range of options consisting of WIP Inspector, Billing Explanation, Navigate Up/Down, Drill Down, Billing History and Show Field Chooser.
- If you enter an amount in the **Bill** field other than the full WIP amount, the remaining unallocated WIP will be carried forward to be allocated to the next bill.
- You can allocate a write-off by entering an amount into the **Write-Off** column.

Stage Three – Create Billing Paragraphs

1. The **Print Line Detail** area allows you to select how the billing paragraph text will appear in the invoice.
2. To add a new paragraph to your bill, select the existing paragraph line that you want to precede the new line and click the **Add** button.
3. Complete the invoice details as required. For example, you can enter free text into the large text area.



The screenshot shows the 'Billing Wizard - Stage Three' window. It contains a table with columns: Para., Text, Amount, Tax.

Para.	Text	Amount	Tax
1	Fees associated with company secretarial services.	1200.00	120.00
2	Preparation of the Trade and Profit and Loss account for the period ended 30 June 2009 together with a Balance Sheet as the date.	13200.00	1320.00
3	Miscellaneous charges incurred as agreed.	600.00	60.00

Below the table is a text area containing: Miscellaneous charges incurred as agreed.

Summary table at the bottom:

Time	Detailed	Misc	Summary	Users Total:	15,000.00	1,500.00
Diab	Summary	Est	Summary	Actual (Required) Total:	15,000.00	1500.00

Buttons at the bottom: This Client, Other Client, Move Up, Move Down, Paragraphs, Regenerate, Add, Delete, Cancel, < Back, Next >, Finish.

4. Click **Next** to proceed to the next step of the wizard.