Stage Four – Set Billing Address

- 1. The default or primary address type will display in the **A/Type** field for the bill.
- 2. Select a different address type if required.
- 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.

	DRAFT IN 16 🖬 🜑	UNSEEN		Post
Client	Abbot and Rankine Pty Umited		Draft No. 818	Preview
Company	Smith and Co	Invoice Number		Report
Person		Invoice Date	7/07/2011	
Position				
Bill To Client	Abbot and Rankine Pty Limited			
Address	GPO Box 1451			
Suburb/Town	WELLINGTON		Services 15,000.00	
State	NSW		Tex 1.500.00	
Postcode	2820			
Country			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** ¹⁵⁰ button from within the page.

AUTHORISE AND POST A SUBMITTED BILL

To authorise an individual bill:

 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 **Post** button available within the page.



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ESTIMATES TO COMPLETE BILLING

Quick Reference Guide





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

itage One Create a draft bill			Accountant Enterpri	
Client	Abbot and Rankine Pty Limited	P		
Company	Smith and Co			
Request				
Тах Туре	1 .			
Style	Paragraph Total			
nvoice Number				
nvoice Date	7/07/2011			

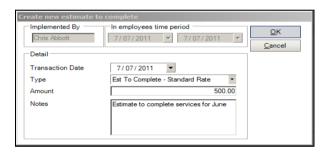
- 2. Type or select the appropriate details for the following:
 - **Company** (if not prefilled)
 - Invoice number -leave this field empty as the system will allocate the number
 - Invoice Style -select the relevant style
 - Invoice Date
- 3. Click **Next** to proceed to the next step of the wizard.

Stage Two – Add Estimate Amount

- 1. Click the Create Estimate button.
- 2. Select the client assignment and click the **Add** button.

A	ssignment		-
C	lear Policies Ltd/ASIC		
C	lear Policies Ltd/Audit		
C	lear Policies Ltd/Financial Services		
▶ CI	lear Policies Ltd/Tax		
			-

3. The **Type** field will prefill with the Estimate to Complete code. Select another code if required using the drop down arrow.



- 4. Type a relevant comment in the **Notes** field if required.
- 5. Click the **OK** button to close.

Add bill amounts					prise
🕈 🖬 🜵 🎒 🗫 🔲 7/07/2011 💌					
Assignment Code Client CodeType	A Job/Schedule	Stape	Employee Depar		
	Unposted WIP	Posted WIP	Write-Off (On)	Bill	Carried Forward
Multimedia Pty Ltd./Tax (MMEDIA1/TAX)			0.00	500.00	(500.00
		.k			(500.00
	0.0	0		.00 500.00	

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

Notes:

- The **Estimate to Complete** code must be set up in the system.
- Estimates are used to raise an invoice for client work that has not been entered in WIP. An Estimate puts a credit against the total WIP amount; there is no write-off/on required.

Stage Three – Create Billing Paragraphs

The **Print Line Detail** area allows you to select how the billing paragraph text will appear in the invoice.

 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.

2. Complete the invoice details as required. For example, you can enter free text into the large text area.

Create Bil	ree Ing Paragraphs	4	Accountants Enterprise
Tr Artal	- 10 - A B Z U	» 🤨 🔹 🕹 📰	
Para			Tax
1	Fees associated with company secretarial services.	1200.00	120.0
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
03	Miscellaneous charges incurred as agreed.	600.00	60.0
Aiscellar	eous charges incurred as agreed.		
Tin	e Detailed * Nisc Summary *	Users Total :	15,000.00 1.500.00
Tin		Users Total :	15,000.00 1,500.00 15,000.00 1500.00

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