Stage Four – Set Billing Address

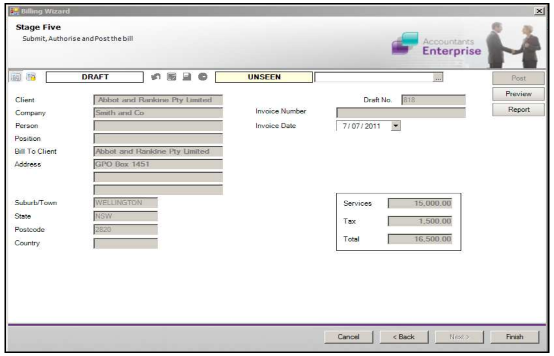
1. The default or primary address type will display in the **A/Type** field for the bill.
2. Select a different address type if required.
3. Click **Next** to proceed to the next step of the wizard.

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.



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 Post button available within the page.

MYOB

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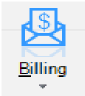
Drafting a Bill using the Wizard

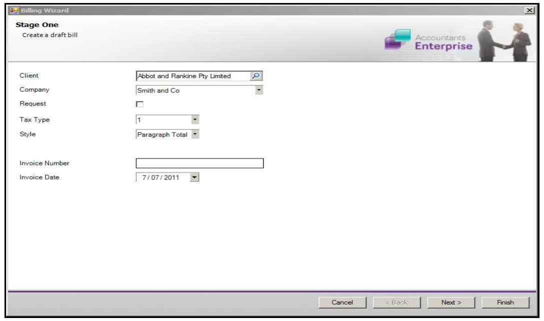
Start the Billing Wizard

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.

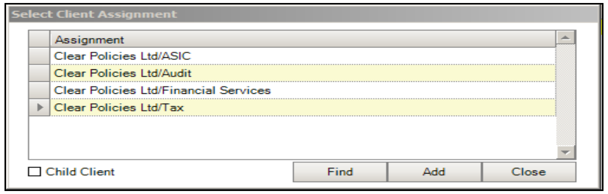
Stage One – Create a Draft Bill



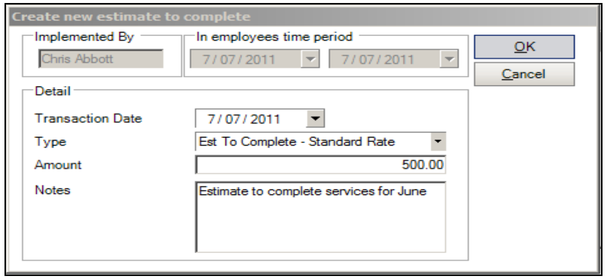
2. Type or select the appropriate details for the following:
   - **Company** (if not prefilled)
   - **Invoice number** -leave this field empty as the system will allocate the number
   - **Invoice Style** -select the relevant style
   - **Invoice Date**
3. Click **Next** to proceed to the next step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

Stage Two – Add Estimate Amount

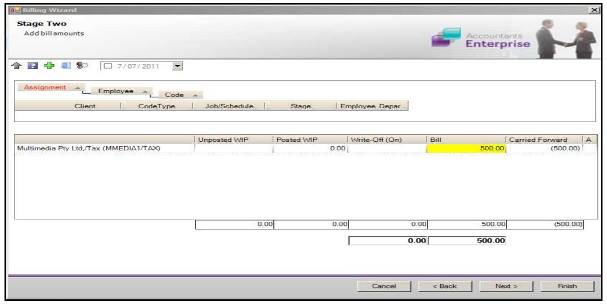
1. Click the **Create Estimate** button.
2. Select the client assignment and click the **Add** button.



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.



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

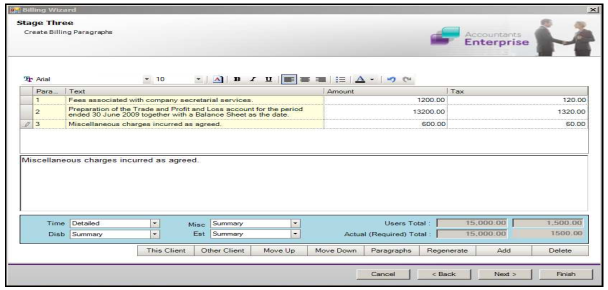
Notes:

- 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.

1. 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.



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