Stage Four – Set Billing Address

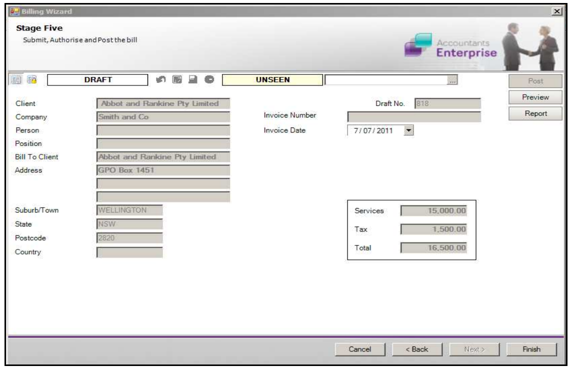
1. The default or primary address type will display in the **A/Type** field for the bill.
2. Select a different address type if required.
3. Click **Next** to proceed to the next step of the wizard.

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 the 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.

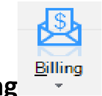
Miscellaneous Charges Billing

Quick Reference Guide

Drafting a Bill using the Wizard

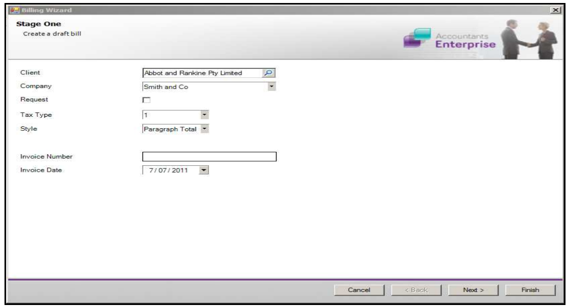
Start the Billing Wizard

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

Stage One – Create a Draft Bill

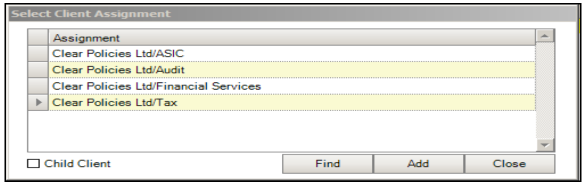


1. Type or select the appropriate details for the following:
   - **Company** (if not prefilled)
   - **Invoice number** -leave this field empty as the system will allocate the number
   - **Invoice Style -**select the relevant style
   - **Invoice Date**
2. Click **Next** to proceed to the next step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

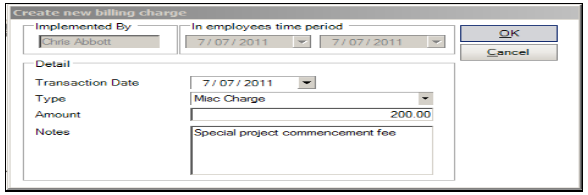
Stage Two – Add Miscellaneous Amount

1. Click the **Create miscellaneous charge**  button to display the **Select Client Assignment** window.

2. Select the client assignment and click the **Add** button to open the **Create new billing charge** window.

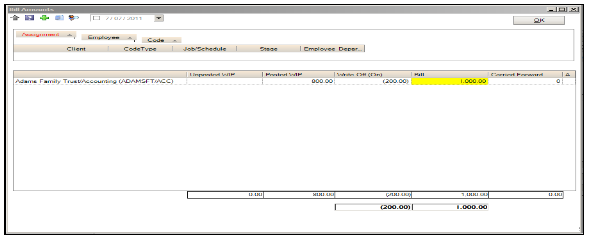


3. The **Type** field will prefill with the **Miscellaneous Charge** code. Select another code if required using the drop down arrow.



4. Type a relevant comment in the **Notes** field if required.

5. Click the **OK** button to close the **Create new billing charge** window.



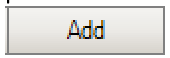
6. Click **Next** to proceed to the next step of the wizard.

Notes:

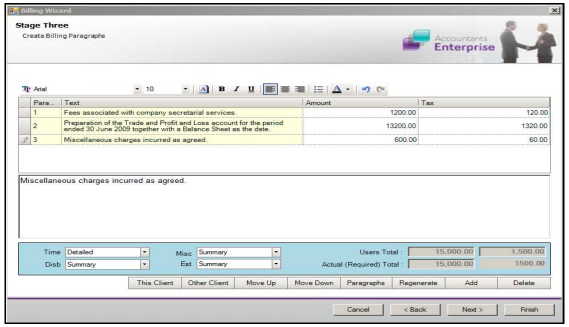
- The Miscellaneous code must be set up in the system.
- A miscellaneous charge increases the value of the Debtors without changing WIP.
- You can apply a miscellaneous charge to any client assignment, regardless of whether it has billable WIP against it.
- You can use a miscellaneous charge bill to raise a Credit Note.

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  button.

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



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