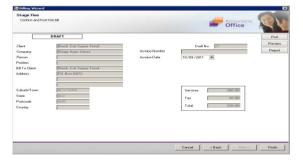## Stage Four – Set Billing Address

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 – Confirm and Post Bill

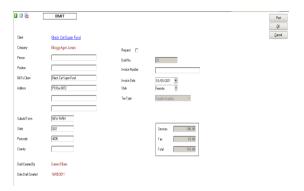This is the final stage of the Billing Wizard.

As you get more experienced you may want to post from this stage.

But for now click on the **Finish** button to come back to the main bills page.

Main Bill Page

This screen displays a summarised view of the Bill. You should confirm that the Invoice date is correct. Now select the **Post** button or alternatively you can click on the **OK** button and save the bill as a draft bill.

ESTIMATES TO COMPLETE BILLING

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
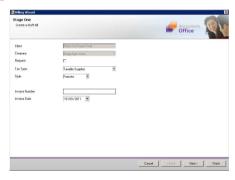
Quick Reference Guide

DRAFTING A BILL USING THE WIZARD

Start the Billing Wizard

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

- The **Client** page**>Bills** tab

- **Billing** icon (drop down menu)

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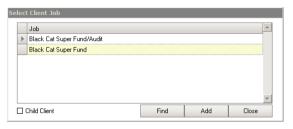
Stage One – Create a Draft Bill

2. Type or select the appropriate details for the following:

   - **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.
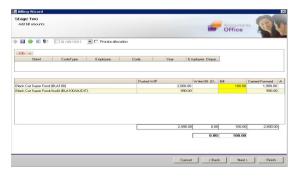
Stage Two – Add Estimate Amount

1. Click the **Create Estimate** ![?] button.

2. Select the client job 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.
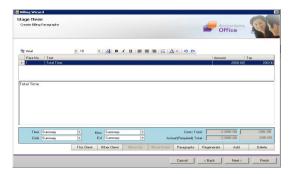

4. Type a relevant comment in the **Notes** field if required.

5. Click the **OK** button to close.

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

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. Or you can select a master paragraph by selecting the Paragraph 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.