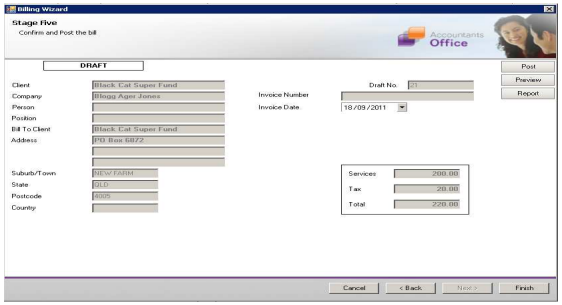
Stage Five – Confirm and Post Bill

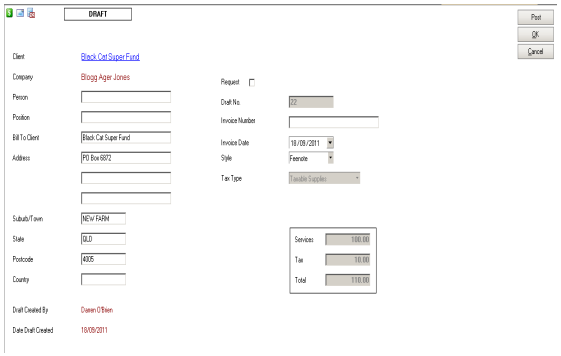
This is the final stage of the Billing Wizard.

For now click on the **Finish** button to come back to the main bills page. As you become more experienced you can post the bill from this page if you prefer.



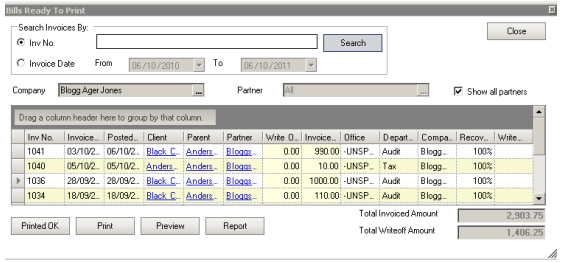
Billing Main Page

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.



Print a Posted Bill

After you have posted a bill the Bills Ready to Print screen will appear.



Highlight the relevant bill or hold your shift key down to highlight several and select either **Print** to print directly to the printer or **Preview** to look at the Bills within Word.

Edit or Post a previously saved Draft Bill

To edit or post an individual bill:

1. Open the draft bill.
2. Make the necessary changes by using the icons across the top to pull up the different stages of the Billing Wizard.
3. When satisfied, click the button available within this page.

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Accountants Office Standard Billing

Quick Reference Guide

Drafting a Bill using the Wizard

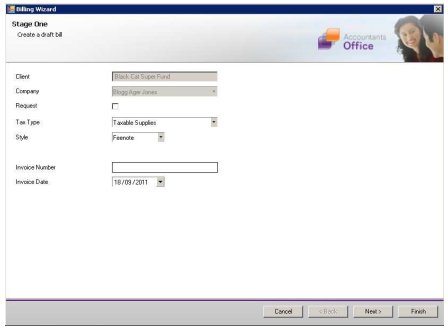
Start the Billing Wizard

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

- 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.

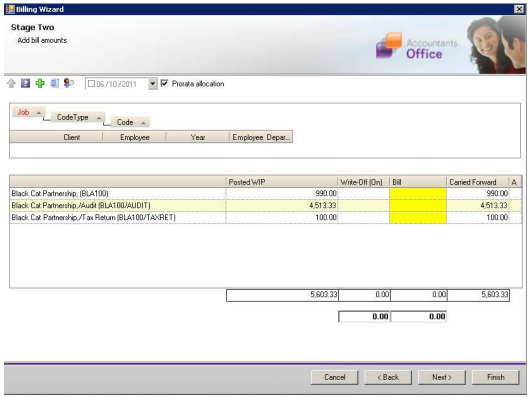
Stage One – Create a Draft Bill



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 Bill Amounts

1. Tick the 02/10/2011 if required.
2. Prorata allocation Tick the Prorata allocation box if you want to bill using Prorata or leave not ticked for FIFO billing.
3. You can either double-click in the **Bill** column to prefill the total amount of WIP outstanding or type in the amount (excluding GST).



- Unbilled WIP will be carried forward to be allocated to the next bill.
- You can allocate a write-off (on) by entering an amount into the **Write-Off** column (a write off is a positive figure and a write on is a negative figure).

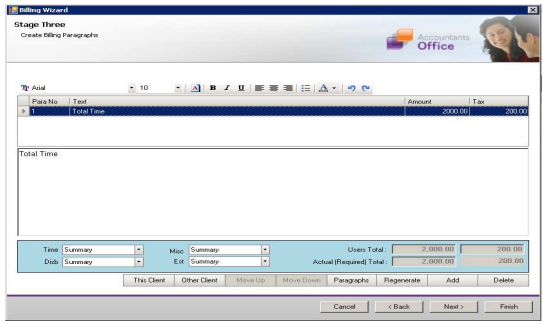
Notes:

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.

4. 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.

Stage Four – Set Billing Address

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