

Billing Your Clients:

The first thing you need to know is that you can undo a billed statement(s) and that returns everything to the way it was before you billed the statement(s). Nothing you will be doing is irreversible.

After you have edited your bills in the **Prebill** screen, go to **Statements**.

The Statements Screen is divided into several sub-screens. The first one is **Create Statements** which is where you are now and from here you will bill. Please look to the right of the screen under Statement Operations and follow these instructions.

Statement Date: From the down arrow menu set the date of the statement(s).

Email Statements to Clients: If any of the statements are to be emailed select this box. To email a statement to a client you have to have checked email statement under Email addresses in the Clients screen.

Select Ready-to-Bill Clients: Click this button, it will check all the statements that meet the billing criteria and or have a balance due. No statement that should be billed will be missed if you use this button.

Preview Selected Clients: Although it is easy to undo one or more statement once it is billed, it is a good idea to Preview your Statements. Most of our customers bill fewer than 40 clients at a time so it does not take long to review them quickly. They are PDFs so you can print them out if you want.

Bill Selected Clients: Click this button to bill.

Caution: If you have to leave the program during this process, when you come back check the Statement date and your Email check to make sure everything is as you left it.

Emailing Statements: If you are emailing statements, when you click Billed Selected Clients, you will get a popup email window that shows you which of the statements will be emailed. You have to have established each client's email in the client screen.

Billed Statements: Select the Billed Statements tab to view billed statements. Statements are organized by Batch Date (Batch = the statements that were billed at one time together). Emailed statements will be noted as Emailed and the date and time to the right of the statement list. If statement not emailed and the client was not setup for emailing, it will say Not Emailed. If it says Not Emailed in red the Client was setup for emailing and for some reason you should know, the client's statement was not emailed.

To undo one statement: Select the statement and under Statement Operations top right, select Undo Statement.

To undo all statements in a batch: Select one statement in the batch and under Batch Operations select Undo Statement Batch.

To Redraft a statement(s) : Read Redrafting and Undoing Statements first.

End 2/13/17