

Changing Statements that have been billed:

You can change billed statements. You can change as many past billed statements as required.

There are two basic methods for changing billed statements, Redraft and Undo. **When in doubt, use Redraft.**

Redraft retains the past statement integrity of data and accounting in each billed statement.

Undo is easier but simply puts all entries back in unbilled so you can start over. Undo does **NOT** preserve the integrity of the billing dates and what data was included in which statement.

Redrafting statements:

(1) Go To Statements/Billed Statements. Select (check) the statement you want to change.

(When redrafting a statement from several months you will want to use search to find them all by client ID or name so they are aggregated on the screen. You merely select each to be redrafted.

(2) Select Redraft Statement (Screen right, Statement Operations).

(3) On popup screen, select "Go to Prebill" if you are adding, changing or deleting log entries.

(4) On popup screen, select "Stay Here" if you are making Client changes (recurring charges etc.).

(5) Make the change on the Prebill or Client Screens.

(6) Go to Statements/Pending Redrafts, select (highlight) redrafted statement, preview and rebill.

Always remember to Rebill the Redraft – problems will result if you do not.