Statements

You can bill a client any time. You can bill one or two clients, or you can bill all clients.   Most offices bill a handful of clients during the month and bill most clients at the end of the month.

Billing one or a few Individual clients:

Go to Statements. Select Statement Date. (screen right – under Statement Functions)
Click email if emailing one or more statements. (below Statement Date)
On far left, Bill column, select each statement to be billed. (If you do not see the client, you can search by Client Name or Client ID in the top search area.
To Preview selected client statements, click the Preview button (screen right - second from the bottom).
To bill, click the last (green) button on the right, Bill Selected Clients.
If you checked Email Statements to Clients, the email popup window will display.

Billing all clients with entries to be billed:

(The following functions are all done on Under Statement Functions, screen right)

Go to Statements. Select Statement Date.
Click email if emailing one or more statements.
Click Select Ready-to-Bill Clients. (On-Request Clients will not be selected)
On popup, click yes to include balance due only statements.
To Preview selected client statements, click second from bottom button.
To bill, click the last (green) button, Bill Selected Clients.
If you checked Email Statements to Clients, the email popup window will display.

Undo a billing:

You can undo individual client statements or all statements in a batch.
You can undo multiple statements for any period of time.

Undoing individual Statements:

Go to Statements. Click on the Billed Statements tab.
Select the statement(s) you want to undo (selection boxes screen left).
Click Undo Statement under Individual Statement Functions (top screen right).

Undoing an entire batch (all statements that were billed together at the same date/time)

Go to Statements. Click on the Billed Statements tab.
Select the first client in the batch. (selection boxes screen left).

(do not select more than one client).
Click Undo Statement Batch. (screen right, Under Batch Statement Functions)

Redraft (edit) Previously Billed Statements

Go to Statements. Click on the Billed Statements tab.
Select Statements to be redrafted. (selection boxes screen left).
(If you do not see client, you can search for the client name, client ID or Invoice number)
Click Redraft Selected Statements. (screen right)
Click Prebill in response to popup question.

On Prebill Redraft Screen, select statement to redraft (Screen left).
Select line item to redraft. (Main Screen). Change and Save.

Preview Statement. While the client is still selected, select appropriate Statement Date and Click Preview Statement. (Screen left, second and third buttons from the bottom).

To Rebill redrafted statement(s). Go to Statements. Click Pending Redrafts tab.
Click on statement to be rebilled. Click Rebill Selected Statement. (Screen top right, second button down).
If you are rebilling more than same client, click on first statement and click "Redraft All for Selected Client". (Screen right, second button from bottom button).

End