“*How do I get this off my bill?*”

Formatting Bills in Timeslips

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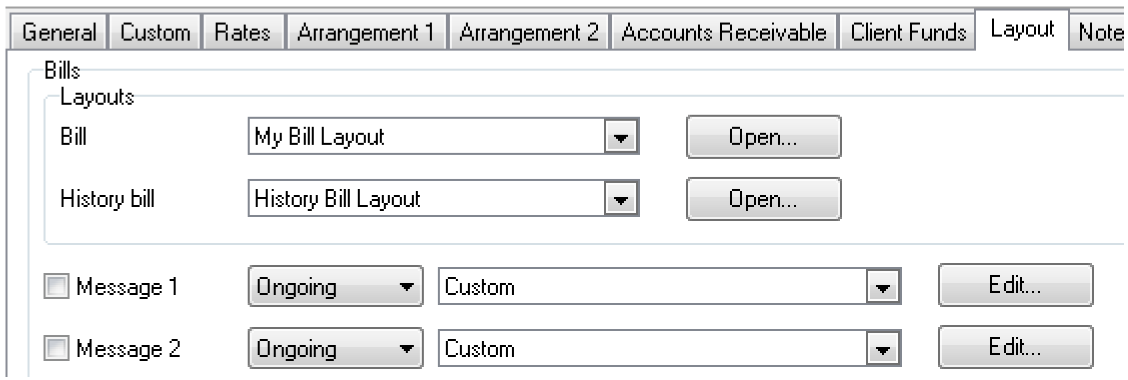
Places that Control Bill Format

- Client Information – Layout Tab
- Bill Layout in Report Designer
- Setup

Client Information – Layout Tab



- Select Bill Layout Template that will control the style of the bill
- Optionally select Global or Custom messages to print on the bill

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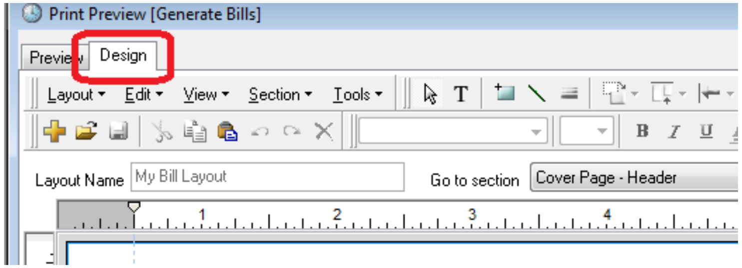
Report Designer Bill Layout Templates

- Controls appearance of the bill
  - Text, position and format of text in headers, footers, optional cover page
  - Inclusion and order of sections (such as fees, costs, timekeeper summary, project summary and aging table)
  - Itemized or summarized slips
  - Phrases that appear with subtotals and totals and other amounts and before sections
  - Column content and placement

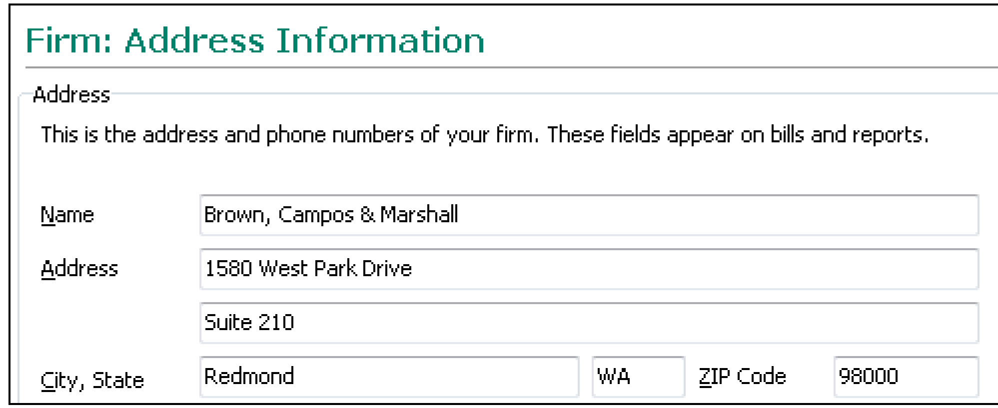
- To access select Bills > Bill and Statement Layouts or click the Design tab when previewing a bill.
- You may create multiple templates and assign them to clients.



Setup General

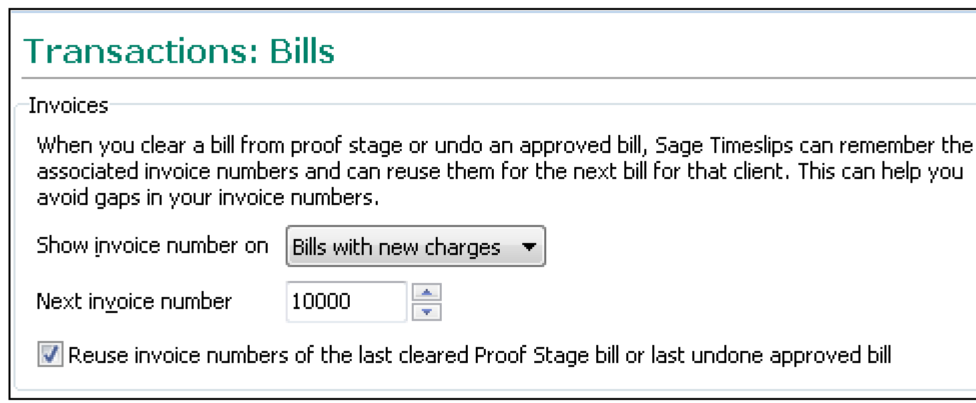
Use Setup, General, Firm to change

- Your Firm's Address



Use Setup, General, Transactions to

- Control when invoice numbers appear
- Set the next invoice number



Setup General

Use Setup, General, Transactions to

- Change the default description for transactions.

Transactions: Default Descriptions

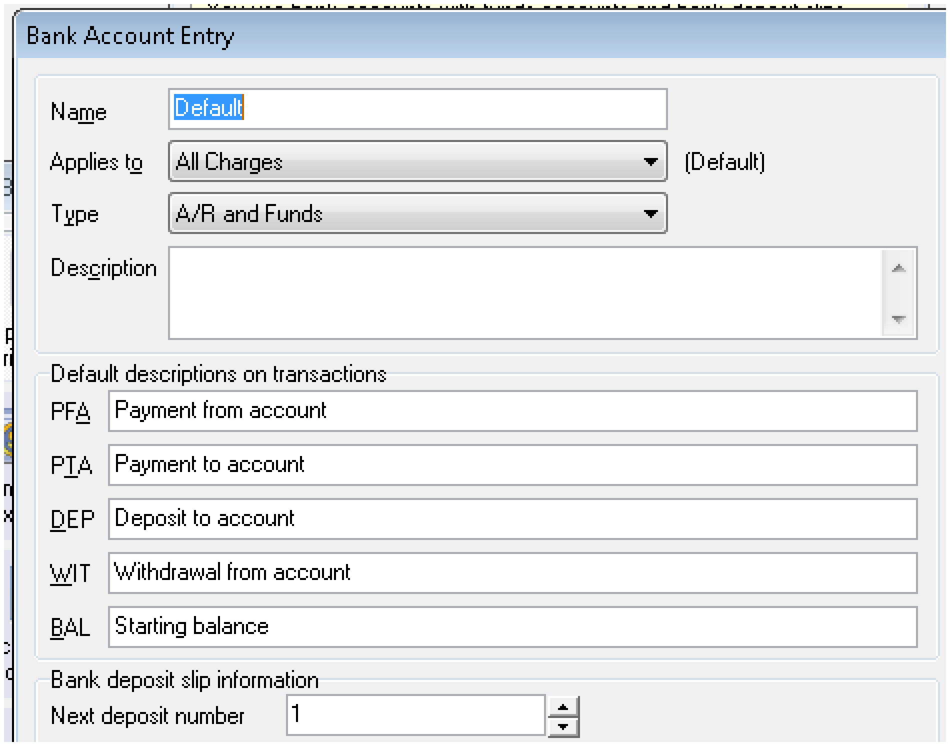
Determines the default description text that appears when you choose a transaction in the Acc
Receivable Entry dialog box.

Transaction	Type	Description
Payment	PAY	Payment - Thank You
Credit	CRED	Credit
Write-Off	WOFF	Write off bad debt
Refund	REF	Refund
Invoice	INV	Invoice
Reverse Payment	REV	Insufficient funds. Payment negated
Transfer	TRN	Transfer
Transfer to Funds	TRNF	Transfer to funds
Discount	DISC	Discount
Special Credit	SPEC	Special credit
Increase Invoice Details	IINV	Increase Invoice Details
Decrease Invoice Details	DINV	Decrease Invoice Details
A/R Starting Balance		Starting balance
Transferred Payment		Transferred payment
After check entry, attach		. Check No. %#
After invoice entry, attach		No. %#

Setup Bank Accounts

Use Setup, Bank Accounts to change

- The name of the funds account on bills
- The default descriptions on fund transactions
- The next number for deposit slips.



Setup Messages

Use Setup, Messages to

- Add or change messages for all bills and overdue bills.
- Create global messages to assign to only certain clients (see slide 3)