

*“How do I get this off my bill?”*

# Formatting Bills in Timeslips

Prepared by: Arita Damroze, A.B. Sims Consulting

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# Places that Control Bill Format

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

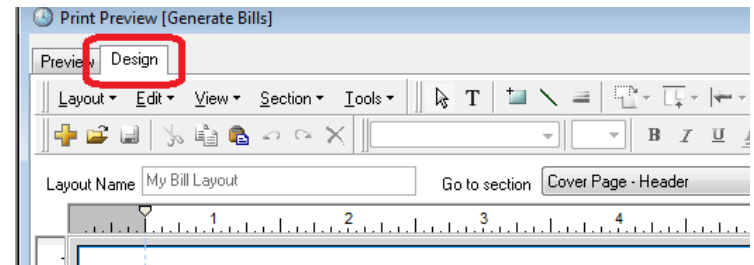
# Client Information – Layout Tab

The screenshot shows a software interface with a tabbed menu at the top: General, Custom, Rates, Arrangement 1, Arrangement 2, Accounts Receivable, Client Funds, Layout (selected), and Note. Below the tabs, the 'Bills' section is expanded to show 'Layouts'. There are two rows for layouts: 'Bill' with a dropdown menu set to 'My Bill Layout' and an 'Open...' button, and 'History bill' with a dropdown menu set to 'History Bill Layout' and an 'Open...' button. Below the layouts, there are two rows for messages: 'Message 1' and 'Message 2'. Each message row has a checkbox, a dropdown menu set to 'Ongoing', another dropdown menu set to 'Custom', and an 'Edit...' button.

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

# 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

**Firm: Address Information**

Address

This is the address and phone numbers of your firm. These fields appear on bills and reports.

Name

Address

City, State   ZIP Code

**Transactions: Bills**

Invoices

When you clear a bill from proof stage or undo an approved bill, Sage Timeslips can remember the associated invoice numbers and can reuse them for the next bill for that client. This can help you avoid gaps in your invoice numbers.

Show invoice number on

Next invoice number

Reuse invoice numbers of the last cleared Proof Stage bill or last undone approved bill

# 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 Accounts 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.

Bank Account Entry

Name:

Applies to:  (Default)

Type:

Description:

Default descriptions on transactions

PFA:

PIA:

DEP:

WIT:

BAL:

Bank deposit slip information

Next deposit number:

# 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)

