Table of Contents – Billing Matters 14 Basic Training

LESSON 1: OVERVIEW, INTERFACE & NAVIGATION 6

OVERVIEW 6
OPENING BILLING MATTERS 7
BILLING MATTERS SCREEN LAYOUT 8
NAVIGATING IN BILLING MATTERS 10
LISTS AND FORMS 14
EXERCISE 1 18

LESSON 2: ENTERING TIME AND EXPENSE BILLING ITEMS 20

QUICK ITEM LIST 28
TIMESHEET 30
CREATE BILLING RECORD FROM OTHER RECORDS 31
TIME ENTRY ADVISOR 32
EXERCISE 2 35

LESSON 3: PROGRAM LEVEL SETUP - BILLING 38

INITIAL BILLING SETUP 38
RATE & AGING OPTIONS 39
INVOICE AND ALLOCATIONS OPTIONS 42
ACCOUNTING OPTIONS 44
EXERCISE 3 46

LESSON 4: AUTOTXT CODES 48

CREATE AUTOTXT CODES 48
EXERCISE 4 50

LESSON 5: RATES AND RATE TABLES 52

CREATE A RATE TABLE 52
CHANGE A RATE TABLE 55
STAFF RATES 57
BILLING CODE RATES 59
EXERCISE 5 61

LESSON 6: ADDING A NEW MATTER 64

ADD A NEW MATTER 64
EXERCISE 6 77

LESSON 7: ENTER BEGINNING BALANCES 80

ENTER BEGINNING BALANCES 80
EXERCISE 7 84

LESSON 8: BILL PROFILES 86

CREATE A BILL PROFILE 86
OPTIONS TAB 87
ITEMIZE OPTIONS TAB 88
TOTALS & SUMMARIES TAB 89
MESSAGES TAB 90
PRINT ORDER TAB 91
LABELS TAB 92

EXERCISE 8 93

APPENDIX: DATABASE MAINTENANCE 96

DAILY PROCEDURE – BACKUP DATABASE 96
MONTHLY PROCEDURE – RE-INDEX DATABASE 100