

Table of Contents – Timeslips 2019/Premium Intermediate Training

LESSON 1: PREPARE FOR BILLING	6
BILLING CYCLE OVERVIEW	6
BILL PREPARATION	7
BILLING ASSISTANT	8
EXERCISE 1	26
LESSON 2: FORMATTING THE BILL	28
BILL LAYOUTS	28
CONTROL OF TIME AND EXPENSE TOTALS ON BILLS	42
BILL COVER PAGE	43
GLOBAL OPTIONS	48
BILL MESSAGES	50
REPLACEMENT SLIPS	55
EXERCISE 2	58
LESSON 3: PRINTING BILLS	60
PRINTING BILLS	64
BILL STAGES AND APPROVAL	66
PROOF STAGE	66
APPROVING BILLS IN PROOF OR REVISION STAGE	67
CLEARING PROOF STAGE	69
MOVING BILLS TO REVISION STAGE	69
CLEARING REVISION STAGE	69
UNDOING APPROVED BILLS	70
EMAILING THE BILL	72
QUICK BILL	75
REPRINTING BILLS	79
EXERCISE 3	81
LESSON 4: TRANSACTIONS	84
LIST AND ENTRY WINDOWS	84
FILTERS AND SELECTION CRITERIA	87
ACCOUNTS RECEIVABLE TRANSACTIONS	88
ENTERING A PAYMENT	90
APPLYING PAYMENTS AND CREDITS	91
PAYMENT RECEIPT	93
WRITE-OFFS	95
REFUNDS	96
INVOICE TRANSACTIONS	97
REVERSE PAYMENTS	98
TRANSFERRING UNAPPLIED AMOUNTS FROM PAYMENTS	99
CLIENT FUNDS TRANSACTIONS	100
ENTERING CLIENT FUNDS TRANSACTIONS	101
PAYMENT TO CLIENT FUNDS RECEIPT	104
EXERCISE 4	106
LESSON 5: BILLING ARRANGEMENTS	108
TO ADD AN ADJUSTMENT:	110
DISPLAYING ADJUSTMENTS ON BILLS	112

CLIENT REFERENCES.....	114
MASTER CLIENTS AND PROJECT CLIENTS.....	115
EXERCISE 5.....	119
LESSON 6: SPLIT BILLING	122
CREATING SPLIT BILL RULES	122
GENERATING A SPLIT BILL	126
SPLIT BILLS AND BILL FORMATS	126
EXERCISE 6.....	127
LESSON 7: REPORTS	130
REPORT TYPES	130
REPORTS WINDOW	131
REPORT GROUPS.....	131
GENERATING A REPORT	133
REMOVING FILTERS AND SORT SETTINGS	138
REPORT OPTIONS	139
PRINTER OUTPUT OPTIONS.....	140
EXERCISE 7.....	141
APPENDIX: BACKING UP YOUR DATABASE.....	144
DAILY PROCEDURE	144
MANUALLY BACKING UP YOUR DATA	146
SCHEDULED BACKUP OF YOUR DATA.....	150