Creating bills for clients using the Billing Wizard

Practice Manager only

There is a **Billing Wizard** to guide you through all the stages in the billing process quickly and easily. This wizard will always be your starting point when you need to bill a client.

If you prefer, you can use the wizard to create a draft bill or to reach a certain stage in the billing process and then save the draft bill and complete it at a later time. All bills created with the Billing Wizard are listed on the client's **Bills** tab and can therefore be opened and worked on at any time outside the wizard in the usual way.

When you have analysed a client's WIP and are ready to create a bill for them, generate a new draft bill. Then define the contents of the bill and the amounts to be billed.

There are five stages in creating bills for clients:

- Opening the Billing Wizard
- Stage One—Create a draft bill
- Stage Two—Add bill amounts
- Stage Three—Create billing paragraphs
- Stage Four—Set billing address
- Stage Five—Submit, authorise and post the bill (AE)/Confirm and post the bill (AO).

Related topics
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