Timeslips by Sage Fixed Asset Billing Cycle Training Class

This course is ideal for the person who has had some experience with the basic features of Timeslips but has the need to know the process of billing their clients. Bills list services rendered, expenses received, charges due, and payments received. They are the result of content, format, and placement decisions made throughout Timeslips. Because a bill's look, language, and detail level are the result of many interrelated decisions, you should understand the process as well as the various tools in producing and managing your client bills:

This Training Course is designed to bring you through the process of:

Slip Entry

Slip Options:
Billing Statuses - determine if a slip or part of a slip will be included and charged on a bill.
Slip Adjustments- allows you to alter the value of the slip before it is billed by settings markups, adjustments, and unbillable time.

Billing Assistant

Use the Billing Assistant as an editable Pre-bill Worksheet. Like the worksheets accessed from the Bills menu, Billing Assistant offers an insight into each client's up-to-the-minute status and provides every detail that contributes to the calculation of the client's next bill.

Firm Assistant

The Firm Assistant allows you to view billing information for all clients in your firm, or a selected group of clients. The Firm Assistant enables you to edit the data that it displays. You can edit just about anything that will affect the invoice, including slips, flat fees, transactions, taxes, and interest.

Pre-Bill Worksheets

The Pre-bill Worksheet includes all the billing data in Timeslips that has not yet appeared on a final bill. The worksheet is usually printed prior to generating the bills. Use this worksheet to get an up-to-the-minute status on your clients.

Billing Arrangements

Flat Fees- There are times when you know exactly what you are going to bill the client for services rendered and you are not billing the slip amounts but you want to track the slip values. Flat Fees allow you to determine the amount to be billed and also track all work performed. There are reports in Timeslips to compare what was billed for the job as well as what would have been billed if you charged the client according to your slips.
Bill Adjustments-Adjustments increase or decrease client charges. They affect current billable charges only. You can apply adjustments to time charges, expenses singularly, or time and expense charges combined.

Generating Bills

Bills are the final product that you send to clients, listing work performed, expenses incurred, charges due, and payments received.

Basic Bill Design and Formatting

Designing and formatting professional style bills through Report Designer and Bill Templates.

Bill Stages

Deciding the process in which you will use when it is time to generate your bills. The bills can be put into Proof stage until you are absolutely sure that they are correct. If there is something that needs to be corrected the bill can be put into Revision Stage, from Proof Stage, to allow editing of the information. The final step, when you are satisfied with your bills is Approval.

Entering Transactions

The process of entering financial exchanges between you and your clients that affect the client's accounts receivable balance. They track client charges through invoices and responses those invoices through payments, credits, write-offs, and refunds.

Reports

Printing and reviewing post-billing reports.

Generating Statements

Statements provide your clients with a chronological list of invoices and payments.

Fee: 1 day session $399.00
Manual Included

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P.S. Save $25 on each additional class!