Practice Management – Billing

e-Learning

CCH
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Aims

To help new users of practice management raise bills against existing WIP, in advance of future WIP or as a miscellaneous charge/credit note. Utilise all inbuilt functionality and approval processes to present a professional and accurate bill.

Objectives

After attending the course delegates will be able to:

- ✓ Run a pre-billing report
- ✓ Create a draft bill
- ✓ Add bill amounts
- ✓ Add/modify bill paragraphs
- ✓ Review/change a draft bill
- ✓ Adjust WIP amounts on a draft bill
- ✓ Add a miscellaneous charge to a draft bill
- ✓ Raise a credit note
- ✓ Raise an estimate fee for a client
- ✓ Add notes and other billing information
- ✓ Submit, authorise and post a bill
- ✓ Print a posted bill

Pre-Requisites

- ✓ Have a working knowledge of Windows software.
- ✓ Be able to use a keyboard and mouse without help.

Duration

We estimate this course to take a maximum of 90 minutes to complete.
Please remember that our e-Learning courses can also be used as a post-training support tool.