Sage Timberline Office

Anytime Learning | Construction Accounting Subscription

The Construction Anytime Learning subscription provides a convenient introduction or refresher to the workflow processes and features of the Sage Timberline Office accounting applications, including Job Cost. These Anytime Learning lessons are well-suited to acquaint new-hires, cross-train employees, and revisit skills that haven't been used in awhile.

Each lesson is a recorded, instructor-led presentation that includes demonstrations of the software and guidelines for daily tasks.

Lessons are from 5-20 minutes in length, and are always accessible and ready to view at anytime you choose. Convenient controls allow you to play, pause, fast forward, or go back and repeat parts of the session. You can:

- View a lesson as many times as you like.
- Encourage all interested departments to access the sessions—your subscription is for the entire company.
- Choose lessons in the order that is most logical to you (although note any recommended prerequisites).

To register for this Anytime Learning subscription, visit **www.sageu.com** or call the training information team at 877-724-3285.

Concepts and Tools

New in Version 9.8

Version 9.8 offers improvements in performance as well as several new features and enhancements to make your workflow more efficient. This lesson highlights the changes in each application. View this lesson to get a quick introduction to the Server Migration Tool, new government forms and direct deposit options in Payroll, the batch email notification option added to Document Management, added security for Project Management change requests, new compatibility with Microsoft Office 2010, a new SMTP email sending standard, and system-wide journal enhancements. This lesson also highlights the Credit Card Processing and Electronic Fund Transfer features added to Accounts Payable, and the new customizable HR Forms added to Payroll.

New in Version 9.7

Version 9.7.0 provides you with the most asked-for enhancements as well as expanded compatibility with the latest technologies. View this lesson to find out how this version can benefit you. Discover an easier way to analyze and report on data using the new Basic Office Connector Starter feature. This feature can transform the way you find and analyze data from across your Sage Timberline Office applications. Find out about our expansive tax filing and reporting capabilities for state and federal government forms. Learn how to use the new Sage Installation Manager wizard to reduce time spent updating your workstations. Take a look at a new integration with AutoDesk's Quantity Takeoff 2010 project, and at our expanded Advanced Assembly Databases. See how Document Management automates more processes for you with Rules-based Routing. Learn about other enhancements and about the most recent supported platforms.

New in Versions 9.5 and 9.6

Are you upgrading to Sage Timberline Office 9.7.0 from version 9.4 or 9.5? If so, watch this lesson to understand what features have been added in versions 9.5 and 9.6. Learn about general enhancements to several applications as well as terminology and inquiry changes that impact everyone. You'll want to know about the new default locations for program and data files and how those affect you. Find out which security features have been enhanced, how to access the new Security Administration Tool, and much more.

Use Setup Central

If you are a new Sage Timberline Office customer, and your business partner or consultant has determined that Setup Central is a good match for your business, watch this session before you begin to use Setup Central. We'll show you how to access this popular tool, and how it can simplify and shorten your setup process. You will learn how to prepare to use Setup Central so that you can complete your software implementation with efficiency and ease.

Use the Sage Knowledgebase

Ever wish you had a Sage customer support analyst sitting at your desk? Or maybe the whole support team? Wish granted. You have access to the knowledge of our entire support team in a new Knowledgebase—and you can access it 24/7. Take a tour of this interactive, online tool so that you can find articles, release documents, software alerts, and notices related to any Sage product. First, we'll explore the expansive search options. Then we'll show you how to subscribe to a Knowledgebase article, so that you can receive updates by e-mail when the article has been modified. Won't that be handy for keeping track of tax changes? You'll also see how to give feedback on an article to the author, how to rate articles, and how to find the articles that have been rated as most useful. This session will benefit anyone who wants ready answers when software questions arise.

Use Help

Did you know that you can use the Help system to find out how to accomplish a task, fix a problem, define an industry concept, or learn about changes in a new release of the software? Anyone who uses Sage Timberline Office can benefit from learning how to get the most out of the Help system.

Understand Data Structure

Learn the basic concepts of data structure, file types, and postings, with an emphasis on what you need to know to use reports. This helpful introductory session is designed for anyone who uses Sage Timberline Office.

Use Reports and Inquiries

Information is power. Unleash the power of Sage Timberline Office and create reports and inquiries that organize and display vital information about your business. Learn the basic concepts to produce reports and view inquiries, and discover how to control the information you see or print. This session is helpful to anyone who uses Sage Timberline Office. To get the most out of this session, first view the Understand Data Structure session.

Customize Your User Settings

Want to customize Sage Timberline Office to your specific preferences? Learn how to set up the fixed decimal feature, printer fonts, toolbar and status bar configurations, and the print-to-file option. This session is designed for anyone who uses Sage Timberline Office.

Manage Files

Learn how to use Sage Timberline Office file management tools to help you manage your data and keep it running in tip-top condition. This session provides step-by-step instructions on how to backup and restore data files, and how to upgrade files after you have installed a new software release. Learn how to archive old transactions, remove unused records, and compact your files. This session is designed for system administrators, accounting managers, and data entry staff who are responsible for managing data.

Address Book

The Sage Timberline Office Address Book is an integrated contact list that can be used by other Sage Timberline Office applications, including Project Management, Accounts Payable, Accounts Receivable, and Estimating. Discover the benefits of using Address Book and gain a basic understanding of this effective tool. Learn how to set up the companies you work with, and the people that you communicate with into an integrated list of vendor contacts, customers, subcontractors, and other contacts. See how other applications access the appropriate list for each situation. This session is designed for anyone who uses Sage Timberline Office and references a list of company or individual contacts.

Desktop

Desktop Overview

What is the Sage Desktop? How can it simplify access to the tasks and information you need on a daily basis? Learn the components of Desktop and the tools available to help you customize Desktop. This session is helpful to anyone who wants to learn the benefits of using Desktop.

Use Desktop Tasks

How can you get the tasks, reports and websites that you frequently use into your Desktop? Learn how to create and organize My Tasks in Desktop. Review tools and tips that maximize your use of My Tasks. This session is designed as a follow-up to the Desktop Overview session, and is appropriate for anyone who uses Sage Timberline Office.

Navigate the Desktop Content Area

Do you need instant access to the current status of your projects, accounts, or properties? A Desktop Home Page can provide just that. Learn how to select a default Home Page and how to navigate within it. This session is designed as a follow-up to the Desktop Overview session, and is appropriate for anyone who uses Sage Timberline Office.

Accounts Payable

Set Up Vendors

Want to make daily invoice entry and check printing more efficient? Learn how to set up vendor information such as terms, discounts, and default codes for invoices. Learn where to store numbers for reports, 1099 forms (US), and T-5018 forms (Canada). This session is designed for anyone who sets up vendors in Accounts Payable.

Enter Invoices

Learn the basic information required for an invoice such as vendor name, invoice number, invoice date, and amount. Find out how to set up other options, such as accounting periods, payment dates, discounts, coding, back charges, and retainage to expedite invoice processing. This session is designed for anyone who enters invoices in Accounts Payable.

Post Invoices

Want to know all your options when posting invoices? Learn how to post invoices during invoice entry or as a separate step. Review what happens to amounts and totals when you post. Find out how to read the Post Invoices report and why it's important. This session is designed for anyone who posts invoices in Accounts Payable.

Select Invoices to Pay

Do you ever pay for something with handwritten checks? Or have the payment deducted directly from your bank account? Find out how to record manual checks and EFTs in the system so that your cash and payables are up to date. View this session to also learn how you can print one or more on-demand checks, whether the invoice is already in the system or not. This session is suitable for anyone who enters invoices and processes payments in Accounts Payable.

Print Checks

Want to streamline the invoice payment process? Learn how to select invoices for payment—automatically or manually—based on conditions, ranges, and selections that you set up in your system. Find out how to hold back payment for a particular invoice or make a partial payment. Learn how to use reports to confirm which invoices are selected for payment. This session is designed for anyone who pays invoices in Accounts Payable.

Manual Checks, Quick Checks, and Electronic Fund Transfers (EFTs)

Do you ever pay for something with handwritten checks? Or have the payment deducted directly from your bank account? Find out how to record manual checks and EFTs in the system so that your cash and payables are up to date. View this session to also learn how you can print one or more on-demand checks, whether the invoice is already in the system or not. This session is suitable for anyone who enters invoices and processes payments in Accounts Payable.

Credit Card Transactions

Does your company ever pay for purchases with a corporate credit card? This session demonstrates the workflow when credit cards are used as a form of payment. Learn how to set up credit cards, track purchases, reconcile transactions to your billing statement, and generate an invoice to pay the balance of the credit card. This session is designed for anyone who processes payments in Accounts Payable.

Error Correction

Do you know what to do if your checks don't print correctly? How can you correct the account coding on an invoice? What if you used the wrong check date? Learn how to change invoices, reprint checks, and void various forms of payment. This session is designed for anyone who enters invoices and processes payments in Accounts Payable.

Track Sales and Use Taxes

Want to know how to set up Accounts Payable to keep track of taxes during invoice entry? Learn how to set up use taxes and sales taxes and how tax rates are retrieved. Find out how the invoice entry process automates tax and tax liability entries. Review the report that provides you with actual tax and tax liability amounts. If you record use tax or sales tax, this session is for you.

Cash Management

Set Up Bank Accounts

Do you know how to add new bank accounts in Sage Timberline Office? What if the account exists on a different system? Learn how easy it is to set up new bank accounts, enter balances and open transactions, and edit information for your bank accounts. This session is essential for anyone who maintains bank account records in Cash Management.

Edit Register

Find out how to record new cash-related transactions in Cash Management and why it is necessary to do this before you reconcile an account. Learn how to navigate the Edit Register window and enter adjustments, withdrawals, and deposits. Find out how to post entries. This session is designed for anyone who enters data in Cash Management.

Reconcile

Want to know how to reconcile Cash Management bank accounts with your bank statement? Do you know what to do if you're missing a transaction or if the bank statement balance doesn't match your cash account balance? Learn how to clear entries, reconcile individual transactions, suspend the reconciliation, and correct ending balance errors. This session is designed for anyone who reconciles bank accounts in Cash Management.

General Ledger

Set Up Accounts

Do you know how to create new accounts in General Ledger? What if you want to create an account for several divisions or companies? Learn how quickly and easily you can create new base accounts, copy accounts to multiple prefixes, and review your chart of accounts. This session is designed for anyone who is responsible for setting up and maintaining the chart of accounts. This includes accounting managers, controllers, and others that manage or perform tasks within General Ledger.

Record Entries

It's easy to record, organize, and track journal entries in General Ledger. Find out how you can use journals to help identify the types of entries, which can be useful information during reconciliation. Learn how to record entries and use journals, and understand how General Ledger uses the accounting date to manage entries. The session is designed for anyone who performs data entry in General Ledger.

Post Entries

Want to know how to update account balances in General Ledger? Can you post to future, current, and past periods? Do you know how to tell whether everything posted successfully? Find out how to post entries and review the posting journal, and learn about posting limitations and parameters. This session is designed for anyone who performs or supervises data entry in General Ledger.

Error Correction

How can you correct an error in General Ledger? Can you change the original entry, or do you need to create a separate adjusting entry? How do you make adjustments to a prior period? Learn the difference between the Change Entries and Record Entries tasks. Find out how to make adjusting entries to closed periods and adjustments to prior years. This session is designed for anyone who performs or supervises data entry in General Ledger.

General Ledger Reports

Reports are a powerful tool that can help you with reconciliation. Learn how to print essential General Ledger reports and financial statements. This session is designed for anyone who prints reconciliation reports, balance reports, and financial statements in General Ledger.

Close Current Period

What tasks should you complete before you close the month in General Ledger? Learn how and when to use the Close Current Period task, and why it's a necessary step in every accounting period. Find out how to change the open and closed status of a posting period. This session is designed for anyone who is responsible for closing the month in General Ledger.

Job Cost

Set Up Jobs

Find out why setting up a job is the first step in tracking costs and profitability. Learn how you can use special fields to help you save time and effort when you manage a job. This session is designed for anyone who sets up jobs in Job Cost.

Job Central

Job Central provides a quick and easy way to set up a job and its related contract items. Find out when to use this streamlined process, and what it accomplishes. This session leads you through each step of the Job Central wizard, from entering general information and setting up the contract to creating a job structure and recording cost estimates. This session is designed for anyone who performs initial job setup, and uses version 9.3.0 or greater.

Set Up Cost Codes and Categories

Learn how standard cost codes and standard categories can help you track costs and compare cost performance over time. Understand the Job Cost costing structure and learn how to set up standard categories and standard cost codes. This session is intended for anyone responsible for Job Cost setup.

Enter Estimates

You know that estimates play a powerful role in the success of your job. Find out how estimates entered in Job Cost provide a baseline for predicting job profitability and evaluating the job on an ongoing basis. Learn how to manually enter an estimate, import an estimate, finalize an estimate, and run estimate reports. This session is designed for anyone who performs initial job set up.

Enter Miscellaneous Worksheets

Do you need to track numbers beyond estimates, costs, and dollars paid? Find out why you should enter job related information on miscellaneous worksheets in Job Cost, rather than on spreadsheets that aren't integrated with Sage Timberline Office. Learn which values can be recorded in miscellaneous worksheets, including contract prices. View this session if you typically track percentage complete, projected cost-at-completion, original contract amount, and other values in spreadsheets outside your accounting system.

Enter Direct Costs

Most costs affect the job from modules like Accounts Payable and Payroll. What about costs that are not vendor invoices or employee costs? What if you want to allocate overhead against a job, or transfer something from inventory to a job? Find out how to enter job costs not recorded through other applications and transactions that affect only General Ledger. This session is designed for anyone who records cost entries against jobs.

Enter Commitments

How can you track the details of purchase orders and subcontracts? Where can you find the amount you've paid to a vendor? Can you tell whether you've been over-invoiced? Learn how to create, approve, review, and change purchase orders and subcontracts with Enter Commitments. This session is designed for anyone who creates and maintains commitments in Job Cost. If you use both Project Management 9.1.0 or higher and Job Cost, you enter commitments through Project Management.

Enter Change Orders

Did you know that change orders can help you to manage your jobs, evaluate change order costs, and identify profitability? Learn how to create new change orders, approve change orders, and use change order reports. This session is designed for anyone who is responsible for initiating, recording, and approving change orders in Job Cost.

Note: The workflow demonstrated in this session does not apply to customers who use Project Management 9.1.0 or higher with Job Cost. If you use both Project Management 9.1.0 or higher and Job Cost, you enter change orders through Project Management.

Post Entries

Do you know when costs, dollars paid, and billing entries get posted to the job? What potential problems might you face when you post entries to Job Cost? Learn how to post entries and understand posting limits in Job Cost. This session is designed for anyone who posts entries in Job Cost.

Enter Commitment Change Orders

Find out how you can easily record changes to purchase orders and subcontracts, whether you need to increase or reduce amounts, or even change the scope of the commitment. Learn how to create commitment change orders and link them to the original change orders. This session is designed for anyone who creates and maintains commitments in Job Cost.

Note: The workflow demonstrated in this session does not apply to customers who use Project Management 9.2.0 or higher with Job Cost. If you use both Project Management 9.2.0 or higher and Job Cost, enter commitment change orders through Project Management.

Error Correction

How should you correct data entry mistakes made in Job Cost? What if something is coded to the wrong job or the wrong cost code? Learn how to evaluate where to make corrections in Job Cost, and how to change or delete transactions from the current JCT file. This session is designed for anyone who records entries in Job Cost.

Note: Some workflow demonstrations in this session do not apply to customers who use Project Management 9.1.0 or higher with Job Cost. If you use both Project Management 9.1.0 or higher and Job Cost, you adjust estimates by change orders in Project Management.

Close Month

Learn why it's important to close the month in Job Cost and how to benefit from the Job Cost end-of-the-month report. Find out why it's important to run period-end reports before you close the month and run diagnostic reports afterwards. Learn how to close the month in Job Cost and understand the close-month report. This session is designed for anyone responsible for end-of-month procedures in Job Cost.

Payroll

Set Up Employees

Want to set up employees so that processing payroll is faster and more efficient? Learn how to create new employee records and find out how employee information affects time entry. Learn how to add pays, deductions, and fringes to the employee record. This session is designed for anyone who sets up or maintains employee records in Payroll.

Set Up Canadian Payroll

Do you understand the calculation of Canadian payroll taxes? How do you set up Canadian tax rates and employees? This session provides an overview of these topics and offers setup and trouble-shooting tips. Anyone responsible for processing Canadian Payroll should view this session.

Enter Time

Want to speed up the time-entry part of the payroll process? Learn how to prefill employee information and customize time-entry views. Find out how to set up and work with a certified payroll and use different pay types. This session is designed for anyone who enters employee time into Payroll.

Process Payroll

Want to know how to automate the payroll process after time entry? Learn how you can set up Payroll to automatically calculate taxes, deductions, and fringes. Find out how easy it is to reprocess checks to correct errors. Learn how to process salary checks. This session is designed for anyone who processes payroll.

Enter Checks

Do you frequently need to make changes to payroll checks before you print them? Find out how you can create a new check, edit check information, delete a check, or produce a manual check. You'll also learn how to process a check. This session is designed for anyone who processes payroll.

Print Checks

Find out how easy it is to print and reprint payroll checks. Learn how to set print options so that you control how the checks look and what information appears on them. Learn how to print to a file so that you can preview your payroll checks without printing on check stock. This session is designed for anyone who processes payroll.

Post Checks

Learn how the process of posting checks affects your general ledger and other accounting functions. Find out why it's important to close the month before you post checks. This session is designed for anyone who processes payroll.

Error Correction

Do you know what to do if you make an incorrect time entry into Payroll or find a coding error after you've printed and posted checks? Find out how easy it is to correct errors by changing posted and unposted time. Learn how to void checks in any file. This session is designed for anyone who processes payroll.

Period End

Find out how period-end procedures ready your system for the next month's payroll and keep your files running efficiently. Learn how to produce period-end reports, close the payroll month, move checks to a history file, and archive employees. This session is designed for anyone who processes payroll.

HR Forms and Compliance Tool

How can you manage all of the Human Resource paperwork required for each employee? Learn how to track the issuing and receipt of employee-related forms and notices using the HR Forms and Compliance Tool. Find out how to customize and print forms, set up alerts, customize an Employee Manual, and review a history of each employee's forms, agreements, and notices. This lesson is designed for anyone responsible for tracking Human Resource documents.

Accounts Receivable

Revenue Overview

Learn how Accounts Receivable, Contracts, and Billing work together and how they integrate with Sage Timberline Office. Learn different ways you can invoice your customers, which contract structure is the best fit for you, and how to get up-to-date information about the profitability of your jobs. This helpful introductory session provides an overview of the basic revenue concepts, terms, and definitions and is designed for anyone who uses these applications.

Set Up Customers

Your customers are an important part of the revenue workflow. Do you know how to set up your customer database to streamline the receivables process? Learn how to set up customers, associate them with Address Book companies, and assign contact information for billing and correspondence. Find out how to define unique billing terms and tax information. This session is designed for anyone who uses Accounts Receivable.

Set Up Contacts

How many types of contacts do you work with? Do you deal with owners, architects, project managers, billing department personnel, and others? How do you keep track of them? Learn how easy it is to create an Accounts Receivable directory of contacts that lets you access current information through reports and inquiries. This session is designed for anyone who uses Accounts Receivable.

Enter Invoices

What if you don't use Sage Timberline Office to create and print invoices? Learn how easy it is to enter manual invoices in Accounts Receivable. Find out how to allocate amounts to jobs and contracts so that Job Cost, Contracts, General Ledger, and Accounts Receivable reflect updated revenue amounts. Learn how Accounts Receivable prefills invoices with setup information and automatically calculates taxes. This session is designed for anyone who uses Accounts Receivable.

Enter Cash Receipts

Learn about the enter cash receipts workflow. Find out how to enter different kinds of payments, such as cash, checks, and wire transfers. Learn about the methods for applying cash receipts from customers, and how to select the appropriate entry view for different types of cash receipts. This overview session is designed for anyone who uses Accounts Receivable.

Enter Cash Receipts From Customers

You need up-to-date information about your cash flow to make solid business decisions. Sage software lets you record your cash receipts quickly and easily to make that information readily available. Find out how to record cash receipts from your customers, enter full or partial payments to specific invoices or distributions, or apply cash receipts to a customer's balance. This session is designed for anyone who uses Accounts Receivable.

Enter Other Cash Receipts

Do you ever receive non-customer related payments that you need to record as a receipt? Learn how you can easily incorporate these miscellaneous payments as part of your deposit routine and affect General Ledger and Job Cost. Anyone who uses Accounts Receivable to record deposits can benefit from this session.

Note: Before viewing this session, please view the session Enter Cash Receipts From Customers.

Adjust Invoices

Want to learn how to apply a debit or a credit adjustment to an invoice? Find out how to make a variety of adjustments to your invoices, including bad debt write-offs and error corrections. This session is designed for anyone who uses Accounts Receivable to adjust receivables.

Adjust Cash Receipts

How do you handle a check that's been returned for insufficient funds? Find out how to record returned checks and make adjustments, including how to correct mistakes with your cash receipts. This session is designed for anyone who uses Accounts Receivables to record and adjust cash receipts.

Bill Retainage

The job is complete and now you're ready to bill the final portion of the invoice. How do you bill retainage that has been previously withheld? Learn how Sage Timberline Office tracks the retainage and how easy it is to fully or partially bill retainage from one or more invoices. This session is designed for anyone who uses Accounts Receivable to create billings.

Post Entries

How do you update customer balances with billings, payments or adjustments? How can you see which entries are not yet posted? Learn how to use the Post Entries task, and what this process accomplishes. Find out which transactions are created by Post Entries for interfacing modules. This session is designed for anyone who posts entries in Accounts Receivable.

Reports and Inquiries

Aging reports are an important part of your collections process, impacting the way you manage your company's cash flow. Find out what aging reports are available in Accounts Receivable and how to generate them to get the information you need to see. Also learn about the types of statements you can print and send to your customers. This session is designed for anyone who generates reports and statements in Accounts Receivable.

Contracts

Set Up Contracts

You were just handed a signed contract. How do you set it up in the software to begin the billing process? Your contract setup is the first step to track revenue. Learn how to set up contracts to capture the details of the actual contract and how to set up model templates for future use. This session is designed for anyone who administers contracts.

Set Up Contract Items

Want to know how to define specific billing terms and agreements on the contract setup? Learn how to set up one or more contract items to bill AIA or time and materials. You'll also see how to link contract items to Job Cost to track cash flow and profitability for your job. This session is designed for anyone who administers contracts.

Approve Contract and Contract Items

Are you ready to begin billing against a contract? Learn the crucial step that must occur before the billing process can begin. You'll see how to approve one or more contract items at the same time and how this affects your job amounts. This session is designed for anyone who administers contracts.

Post Entries

How can you show what's been billed and paid against your contract? Learn where these entries come from and how to update the Contracts module so that you have accurate balance-to-bill information. This session is designed for anyone who updates and runs reports in Contracts.

Manage Change Orders

A change in the scope of work requires revisions to your contract that you need to account for in the software so you can bill for the extra work. Find out how to create contract change orders when the change order has been initiated in Job Cost and what to do when it hasn't. This session is designed for anyone who administers contracts.

Note: The workflow demonstrated in this session does not apply to customers who use Project Management 9.1.0 or higher with Job Cost. If you use both Project Management 9.1.0 or higher and Job Cost, you enter change orders through Project Management.

Approve Change Orders

Want to find out how to complete the change order process? Learn how to approve change orders so revisions impact both contract and job amounts. This session is designed for anyone who administers contracts.

Note: The workflow demonstrated in this session does not apply to customers who use Project Management 9.1.0 or higher with Job Cost. If you use both Project Management 9.1.0 or higher and Job Cost, you enter and approve change orders through Project Management.

Close Month

What monthly maintenance task should you do in Contracts? Learn how to avoid posting errors and ensure contract month-to-date totals are accurate by performing this simple task every month. This session is designed for anyone who updates and runs reports in Contracts.

Billing

Billing Overview

What types of billing can Sage Timberline Office produce? This helpful introductory session provides an overview of the basic workflow concepts, terms, and definitions for the Billing module and is designed for anyone who is involved with billing activities.

Process Contract-based Invoices

Do you progress bill your customers? Learn how to enter billed amounts, and approve, send, and print invoices, all from just one task in Billing. You'll also learn tips and tricks to make data entry easier and expedite your work. This session is designed for those who create AIA billings, or bill by lump sum or by units.

Work-In-Progress for Cost-based Invoices

Are your contracts based on time and materials? Learn how to let the system automatically mark up your costs so you can bill at appropriate rates. Find out how to use various Billing tasks to generate billed amounts based on costs created from other modules like Accounts Payable or Payroll. This session is designed for those who create billings based on time and materials.

Generate Cost-based Invoices

The second step to processing cost-based invoices is to create the invoices. Find out how this is done through the Generate Cost-Based Invoices task. Learn the impact of cut-off dates and how they affect what appears on your invoices. This session is designed for anyone who prepares billing.

Change Invoices

Want to know how to place an invoice on hold? How about voiding an invoice? Find out how to change the status of an invoice and the impact of each status type. You'll also learn how to use filters to help you narrow down the invoices listed in this window. This session is designed for anyone who prepares billing.

Bill Retainage

The job is complete and now you're ready to bill the final portion of the invoice. How do you bill retainage that's been previously withheld? Learn what options are available to bill retainage from Billing and when you should use each option. This session is designed for anyone who creates retainage billed invoices.

Print Invoices

Do you know what choices you have when it comes to printing invoices? Find out all your options— from previewing them on your screen to printing draft and final copies. Learn how to modify the appearance of invoices and how to use filters to limit the invoices that print. This session is designed for anyone who prints invoices.

Enter Quick Bill Invoices

Want to find out how to handle billing for non-contract related jobs? How about invoicing for materials or work not related to any job you have set up in the software? Quick Bill offers easy and flexible solutions for these situations. Learn everything about Quick Bill invoices—from creation to printing. See what kinds of invoices Quick Bill can produce. Find out how to use the various options in the Quick Bill feature. This session is designed for anyone who prepares billing.

Post Invoices

You've finished printing invoices for your customer. Now how can you make sure your aging reports or contract totals are updated? How about your financial statements? Learn what happens when you post invoices in Billing. This session is designed for those responsible for posting entries.