

Billing: Quick Bill

Workflow Overview

This diagram identifies typical processes for each task. For the most current and detailed information, refer to Help.

[Enter Quick Bill Invoices](#)



[Print Quick Bill Invoices](#)



[Post Quick Bill Invoices](#)

A quick and easy way to enter invoices that are not associated with a contract. Once you enter the detail, you can change or print the invoice within this task.

You need to print the Quick Bill invoice before you can post it.

Creates Accounts Receivable entries that are used to post revenue (billed) amounts to the customer.

Enter Quick Bill Invoices

The **Enter Quick Bill** task eliminates the need to set up contracts for billing purposes. Use Quick Bill to bill to any:

- Customer with an active status in Accounts Receivable.
- Job not on hold and with a status other than closed that is set up with a billing method of **Use Quick Bill**.
- Customer or job that you add while you enter a Quick Bill invoice.

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to Help, specifically the “Entering a Quick Bill invoice” topic.

1. From the **Tasks** menu, select **Enter Quick Bill**.
2. Add a new invoice.
3. Enter the customer, job, and invoice form.
4. Enter or change the header information as needed.
5. Enter invoice line items in the grid. Click [**Prefill Item**] to prefill invoice items.
6. Create subtotals as needed. Click [**Total Item**].
7. Verify your totals and click [**Finish**] to save the invoice. Review the appropriate Quick Bill Invoice Report at **Reports > QB Invoices**.

Print Quick Bill Invoices

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to Help, specifically the “Printing a Quick Bill invoice” topic.

1. From the **Tasks** menu, select **Enter Quick Bill**.
2. Click [**Print Invoices**].
3. In the **Print Selection** window, select the **Current Invoices** or the **Selected Invoices** check box. If you select **Selected Invoices**, choose whether to display all invoices, only unit-based invoices, only non-unit-based invoices, or only bill retainage invoices in the **Invoice Selection** list.
4. Click [**Select**] and select the invoices you want to print. To select multiple invoices, press and hold down the CTRL key while you use your mouse to select the invoices. Only Quick Bill invoices are available to print from **Enter Quick Bill**.
5. Click [**OK**] to return to the **Print Invoices** window.
6. Click [**Start**] to begin. Review the appropriate Quick Bill Invoice Report at **Reports > QB Invoices**.

Post Quick Bill Invoices

When Quick Bill invoices are posted, records are transferred from unbilled to billed files and entries are created for Accounts Receivable in the new and current transaction file.

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to Help, specifically the “Posting Quick Bill invoices” and “Posting invoices” topics.

1. From the **Tasks** menu, select **Post Invoices**.
2. Click [**Printer Setup**] and select the printer or print file name for the posting journal.
3. Click [**OK**].
4. Click [**Start**] to begin the **Post Invoices** process.