

6. Setting up Invoicing

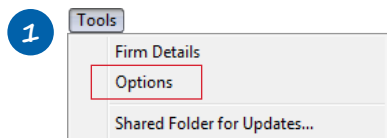
Before you start creating invoices you will want to setup your:

- Activity Codes
- Invoice Numbering
- Invoice Footer

www.leapconveyancer.com.au/training

Main window > Tools menu > Options

- Setting up Activity Codes:
 - Time & Fees
 - Cost Recoveries
- Setting up Invoice Numbering
- Setting up an Invoice Footer



2

General Preferences

General Ledger

Activity Codes

Time & Fees

Cost Recovery

Invoice

Office & Trust Accounts

Branch Offices

Payment Types

Staff Members

Activity Code Fees

Activity Code	Billing Desc.	Tax Code	Inc. Tax	Fee Type
PPRC	Principal Place of residen	GST	<input checked="" type="checkbox"/>	Fee
pur	To our professional costs	GST	<input type="checkbox"/>	Fee
s32	prep	GST	<input type="checkbox"/>	Fee
sal	To our professional costs	GST	<input checked="" type="checkbox"/>	Fee
tel	Telephone call to client	GST	<input type="checkbox"/>	Time Activity

New Activity Code Fee

Activity Code

Billing Desc.

Rate Name: None

Amount Rate

Tax Code: GST

Group On Invoice:

Inc. Tax:

Timed: Time Activity

Billing Mode: Billable - Next Invoice

Submit Cancel

Delete

Delete selected record(s)?

Delete Cancel

Delete row dialog

- Add New Row
- Edit Selected Row
- Delete Row

Add/Edit row dialog

Setting up Activity Codes

Tools menu > Options > Activity Codes.
Click Time & Fees or Cost Recovery.

3

General Preferences

Matter File Number

Transaction Numbering

Accounting

Credentials

Document Types

Public Holidays

General Ledger

Activity Codes

Invoice

Office & Trust Accounts

Branch Offices

Auto Numbering Settings

EFT Auto No. Prefix: E

Last GL Journal No.: 37

Last Invoice No.: 255

Last Office Receipt No.: 15

Last Anticipated Payment No.: 1

Last Disbursement Journal No.: 3

Last Time/Fee No.: 261

Office Bank Deposit No.: 2

Last Cost Recovery No.: 827

Invoice Adjustment No.: 2

Last Credit Journal No.: 0

Last Credit Apply No.: 0

Last Document Packet No.: 11

Last Document Register No.: 5

Last Controlled Money Receipt No.: 0

Setting up Invoice Numbering

Tools menu > Options > General Preferences > Transaction Numbering.

4

General Preferences

General Ledger

Activity Codes

Invoice

Invoice Layouts

Invoice Notices

Invoice Settings

Office & Trust Accounts

Branch Offices

Payment Types

Staff Members

Invoice Notices

State

Notice

Page 0 of 1

No records to view

Setting up an Invoice Footer

Tools menu > Options > Invoice > Invoice Notices.

Add Record

Notice

State: VIC

Submit Cancel

Add Record dialog

