

## **Overview**

Updated 09/21/2021

Sometimes you may have a Customer that wants to be invoiced other than the traditional weekly process.

[Click here for more information on Customer Invoices.](#)

## **Setup**

[Billing Period](#)

[Billing Cycle](#)

[Payment Terms](#)

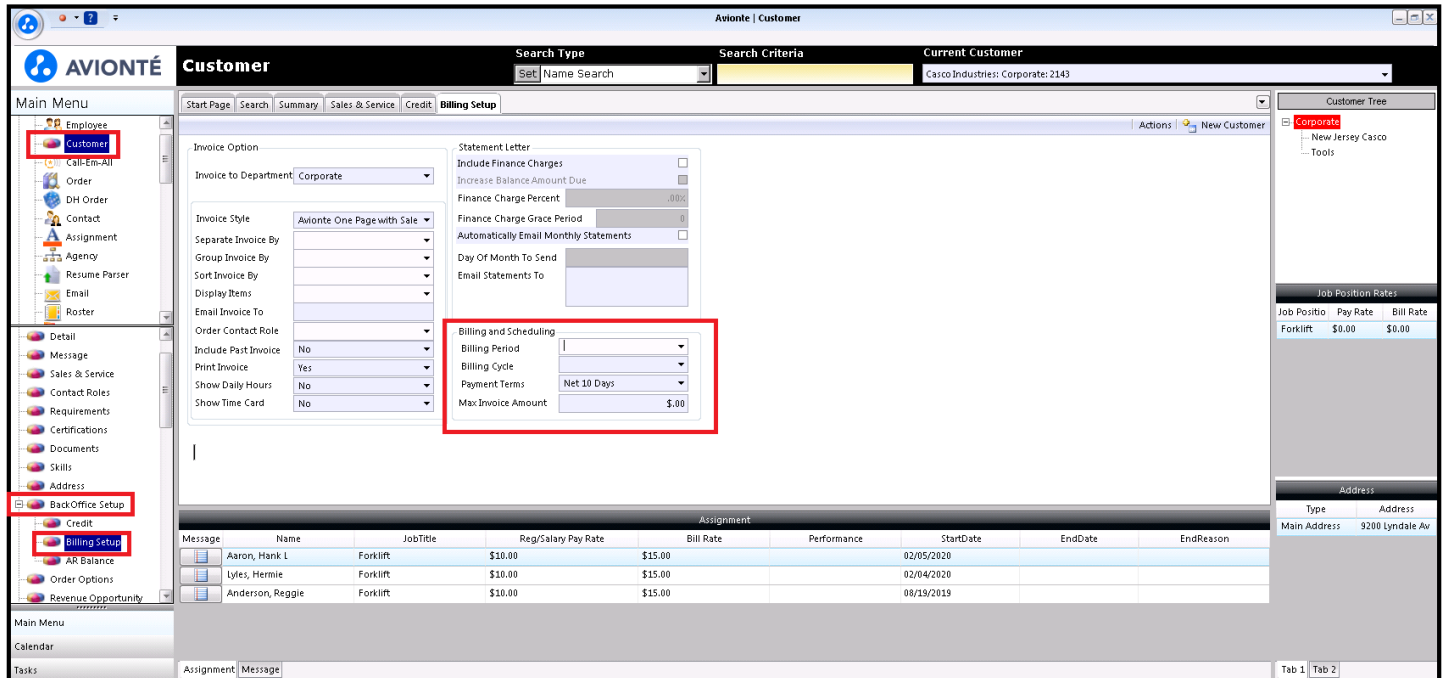
[Max Invoice Amount](#)

## **Examples**

## **Troubleshoot**

## Setup

1. Go to the Customer Record
2. Click on **Back Office Setup** Submenu
3. Click **Billing Setup**
  1. The **Billing and Scheduling** section has the setup options
  2. Use the **TAB** key, to go to another field and save your changes
4. Choose the appropriate options for **Billing Period** and **Billing Cycle**



The screenshot displays the AVIONTÉ Customer Billing Setup interface. The 'Billing and Scheduling' section is highlighted with a red box, showing the following fields:

- Billing Period: [Dropdown]
- Billing Cycle: [Dropdown]
- Payment Terms: Net 10 Days
- Max Invoice Amount: \$0.00

The 'Assignment' table below shows the following data:

Message	Name	JobTitle	Reg/Salary Pay Rate	Bill Rate	Performance	StartDate	EndDate	EndReason
	Aaron, Hank L	Forklift	\$10.00	\$15.00		02/05/2020		
	Lyles, Hermie	Forklift	\$10.00	\$15.00		02/04/2020		
	Anderson, Reggie	Forklift	\$10.00	\$15.00		08/19/2019		

## Billing Period

- - BiWeekly
  - Daily
  - Hourly
  - Monthly
  - SemiMonthly
  - Weekly
  - Yearly

# Setup BiWeekly or Monthly Invoicing



## Billing Cycle

These options will change based on the **Billing Period** selected

- **BiWeekly**
  - Select the first or second week, that you want to Bill/Invoice for
    - 1
    - 2
- **Daily**
  - 1
  - 2
  - 3
  - 4
  - Last Week
- **Hourly**
  - 1
  - 2
  - 3
  - 4
  - Last Week
- **Monthly**
  - Select the number of the Week, in that month, that you want to Bill/Invoice for
    - 1
    - 2
    - 3
    - 4
    - Last Week
- **SemiMonthly**
  - N/A
- **Weekly**
  - N/A
- **Yearly**
  - N/A

## Payment Terms

- Select the terms of payment to apply to this customer.

[Click here for more information about setting up Payment Terms.](#)

## Max Invoice Amount

- Marks where an invoice should be divided, when the limit is reached
  - No invoice will be larger than this amount.
  - It will not divide transactions but will move them to a new invoice (if the invoice grows too large).

# Setup BiWeekly or Monthly Invoicing



- Invoices will be divided by the max amount only after being divided by other selections.

## Examples

Using August 2021 for reference.

August 2021						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Invoicing done in an off-cycle week (where it shows 'Payroll' below), won't change the Invoicing process. Invoices would be pushed to the next week and will be billed together.

**Example:** Bill Cycle = 2

Week 1, invoices are pushed to Week 2

Week 2, invoices for Week 1 and Week 2 are created

Billing Cycle					
08/01 - 08/07	1	2	3	4	Last Week
BiWeekly	Payroll & Billing	Payroll			
Monthly	Payroll & Billing	Payroll	Payroll	Payroll	Payroll

Billing Cycle					
08/08 - 08/14	1	2	3	4	Last Week
BiWeekly	Payroll	Payroll & Billing			
Monthly	Payroll	Payroll & Billing	Payroll	Payroll	Payroll

Billing Cycle					
08/15 - 08/21	1	2	3	4	Last Week
BiWeekly	Payroll & Billing	Payroll			
Monthly	Payroll	Payroll	Payroll & Billing	Payroll	Payroll

Billing Cycle					
08/22 - 08/28	1	2	3	4	Last Week
BiWeekly	Payroll	Payroll & Billing			
Monthly	Payroll	Payroll	Payroll	Payroll & Billing	Payroll

Billing Cycle					
08/29 - 08/28	1	2	3	4	Last Week
BiWeekly	Payroll & Billing	Payroll			
Monthly	Payroll	Payroll	Payroll	Payroll	Payroll & Billing

## **Troubleshoot**

If it had been changed from Weekly to BiWeekly, you would need to finish the current billing cycle before it would re-calculate to issuing out BiWeekly invoices.

Another issue could be if one department was changed to BiWeekly, but the other(s) haven't been.

[Back to Top](#)