



Mastering Billings Pro

8:45am - 1:00pm

Overview of Billings Pro

To get the most from Billings Pro it is important to understand the many features and functions of Billings Pro

Overview of BP Interface

Billings Pro can look deceptively simple. This session takes users on a guided tour of the interface and menus

Billings Pro Database Setup

Having a well setup Billings Pro database and system is essential to get the most from the application. During this session participants work with the instructor to understand the set up a Billings Pro environment correctly for effective use.

Working with slips & blueprints

Is the essence of using Billings Pro. See how to use slips and blueprints effectively to manage time, expenses, quantities, mileage etc.

Working with contacts

See how to manage contacts effectively with Billings pro using Billings, Address Book, Daylite and or MoneyWorks. See how to sort, group and sort contacts for maximum effect.

Quoting & invoicing

Take jobs from estimates to invoicing to payment in a simple and effective workflow. Capture and invoice working slips from Billings Pro, Billings Pro Touch, Timecard and Daylite. Take slips through an approval process and run differential charges. All these aspects of Billings Pro slips are covered in the course. Even making recurring invoices to streamline your business.

Working with retainers

See how easy it is to work with retainers in Billings Pro. Use specialist templates designed for professional services to effectively communicate retainer draw-downs to clients. Ideal for consultants, legal services, IT professionals and other service orientated users.

Managing payments

Tracking payments accounts and statements easily within Billings Pro. Processing payments and sending invoices. Looking at some typical accounting workflows required for Australian business such as BAS returns.

Billing Pro Touch & Timecard

Look at some effective workflows for using Billings Pro on the iPad and iPhone. Billings Pro on the iPad allows users to perform all the critical functions to run their business while being mobile - capture time against jobs, quote and invoice as well as enter a payment receipt or expense slip.

Billings Pro Templates & Reports

Customise your Billings Pro templates with small changes; adding customer headers; making Pro-former Invoices; appending details to names and other such tasks. Take a tour of the Billings Reports to effectively manage your business day-to-day.

Billings Pro integration

Look at the Billings Pro integration opportunities with Apple Contacts, Apple Calendar, Daylite and MoneyWorks. As well as how to export transactions for your accounting suppliers as needed.

Please Bring

An Macbook, a USB key, and a working copy of Billings Pro so you can follow the on-screen lessons. If you need help setting this up prior to the day please contact us.

BillingsPro Training Overview 2014

Time	Topic	Learning Outcomes
8:45	Setup	Please be early to ensure you and your Macbook are ready for a prompt start at 9am sharp.
9:00	Introduction	Introduction around the group
9:10	Intro to BPro	Overview of Billings Pro
9:30	GUI & Setup	Guided tour of Billings Pro as we set up a Billings Pro system effectively and discuss various strategies for effective use for Australian businesses.
10:00	Working with Contacts	Working with Contacts in Billings Pro. Look at the various methods of working with Contacts, searching, sorting and general management.
10:30	Break	
10:45	Estimates & Projects	Estimating, quoting and invoicing within Billings Pro for common workflows including retainers.
11:45	Payments and accounting	Effective payment tracking and accounting processes in Billings Pro.
12:30	BPro Integration	Using Billings Pro with Daylite & MoneyWorks and other applications
1:00	End	