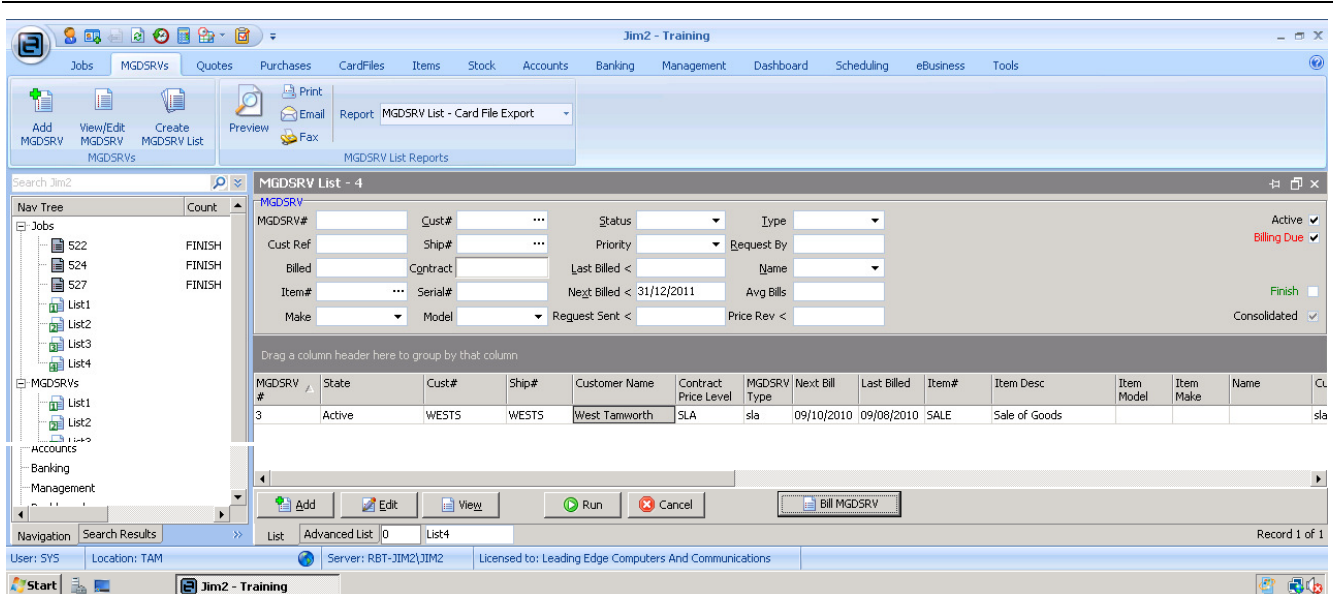


Skill: **Creating the billing jobs from a list of Managed Services/Projects** Who: **Selected Users / Project sites**.

Describe: Jim2 will create billing jobs for the Managed Services/Projects, where the setup has included periodic billing (Monthly, Quarterly, etc).

Context: Used to raise multiple billing jobs, ensuring all clients are invoiced for their periodic obligations.



Skill Steps:

1. Create a Managed Service/Project list. Include all that are “Active” and “Billing Due”.
2. Select an appropriate date in the “Next Billed” field – this may be the end of the current month.
3. Enter additional criteria as required.
4. Run the list.
5. Check the entries on the list. If you are satisfied with the list, Pin and Name the list.
6. This list should be pinned and named.
7. Click “Bill Mgd Serv” button at the bottom of the Jim2 window.
8. Jim2 will add jobs for the purpose of billing the clients, based on the Default stock information and contract price levels entered into the Managed Service/Project.
9. The jobs created will be marked as “READY” (ready to invoice).
10. Create a list of only “READY” jobs.
11. Enter additional criteria as required.
12. Run the list.
13. Check the entries on the list. If you are satisfied with the list, Pin and Name the list.
14. The invoice button on the ribbon is now able to be used to “batch” invoice the “READY” jobs.