

Interim invoicing

Acclipse Practice Manager is designed to generate an invoice for each job as it is completed. However, you can still do interim or upfront billing if required. Depending on your access level you can transfer work in progress:

- From the job you have open to a new job
- From the job you have open to an existing job
- From an existing job to the job you have open

WIP transfer options




Transferring WIP is useful if you wish to invoice a client for work already completed on a large job. You can also use the *WIP Transfer* feature to move work from a general “catch-all” job to a more specific job.

You can access the *WIP Transfer* button from the *Job Details* screen or the *Work In Progress Client Breakdown* report.

Viewing details about WIP transfers on the *Job Details* page

Transfer WIP from current job to new job

As WIP starts to build up on a particular job, you can transfer all or some of it across to a new job. To transfer WIP to a new job:

1. Select **Jobs** → **Jobs**.
2. Click the row of the job you wish to transfer WIP from.
3. Click **WIP Transfer**.
4. Click **From current job into new job**.
5. Click the search  icon beside the *Job* field to change the job you selected (if required).
6. Tick **Cancel job after WIP transfer** if you wish to cancel the existing job once you have transferred the WIP.
7. Click the search  icon beside the *Select Client* field to change the preselected client (if required).
8. Click the search  icon beside the *Job Code* field to change the preselected job code (if required).

TIP: You could use your particular code for interim billing (eg IMP) and have more specific interim billing codes (eg INTAA, INTGST).

9. Add a job identifier for the new job (if required) using EITHER of these methods:
 - Enter a new identifier in the *Job Identifier* field.
 - Click **Copy from Source job** beside the *Job Identifier* field to use the original identifier.
10. Add more details about the new job (if required) using EITHER of these methods:
 - Enter a new description in the *Job Details* field.
 - Click **Copy from Source job** beside the *Job Details* field to use the original details.
11. Change the job type (if applicable).
12. Select the initial job status for the new job using the dropdown field provided.
13. Tick **Do not automatically set the job status to allocated when resources are assigned** (if required).
14. Enter a new budget total or click **Copy from Source Job** to use the source budget total.
15. Enter the WIP amount in the field provided.
16. Enter an additional description about the WIP transfer in the field provided.
17. Click **Save**.

WIP transfer into new job

Transfer From

Job: ID(3039) SPC - Certain, Donna - Date(Oct 30 2009)

WIP Balance: 0.00

Cancel job after WIP transfer:

Transfer to New Job

Select Client: Certain, Donna

Job Code: SPC

Job Identifier: [Copy from Source Job](#)

Job Details: created by Ian Jones for WIP transfer from job 3039 [Copy from Source Job](#)

Job Type: General Annual GST

Job Status: Not Yet In

Do not automatically set the job status to allocated when resources are assigned

Budget Total: 0.00 [Copy from Source Job](#)

Transfer Details


WIP Amount: 300

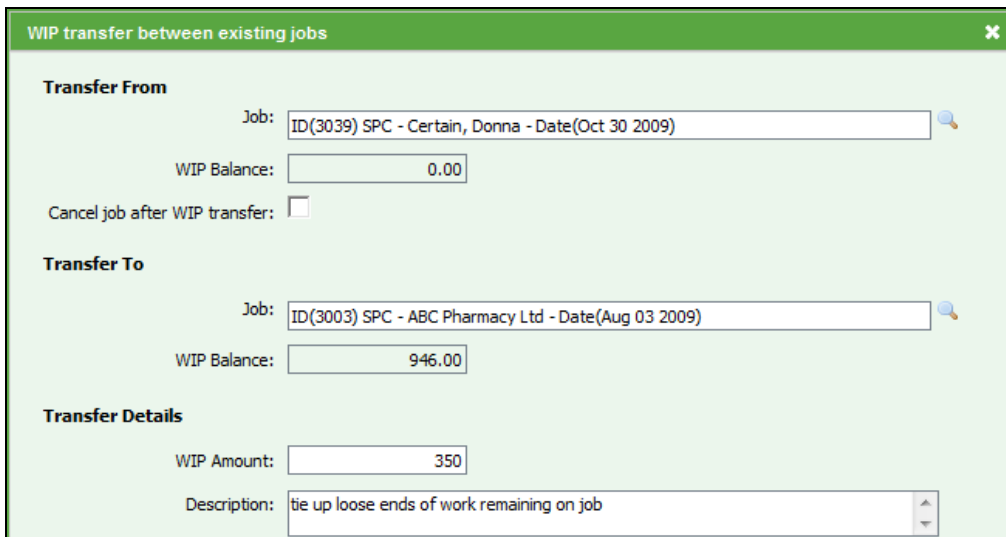
Description: tidy up and finalise job

Transferring WIP to a new job

Transfer WIP from current job to existing job

You can also transfer WIP from the job you have open to an existing job. To do this:

1. Select **Jobs** → **Jobs**.
2. Click the row of the required job to open it.
3. Click **WIP Transfer**.
4. Click **From current job into existing job**.
5. Tick **Cancel job after WIP transfer** if you wish to cancel the existing job once you have transferred the WIP.
6. Click the search  icon beside the second job field to locate and select the existing job you wish to transfer WIP to.
7. Enter the WIP amount you wish to transfer in the field provided.
8. Add a description about the transfer in the field provided.
9. Click **Save**.



WIP transfer between existing jobs

Transfer From

Job: ID(3039) SPC - Certain, Donna - Date(Oct 30 2009)

WIP Balance: 0.00

Cancel job after WIP transfer:

Transfer To

Job: ID(3003) SPC - ABC Pharmacy Ltd - Date(Aug 03 2009)

WIP Balance: 946.00

Transfer Details


WIP Amount: 350

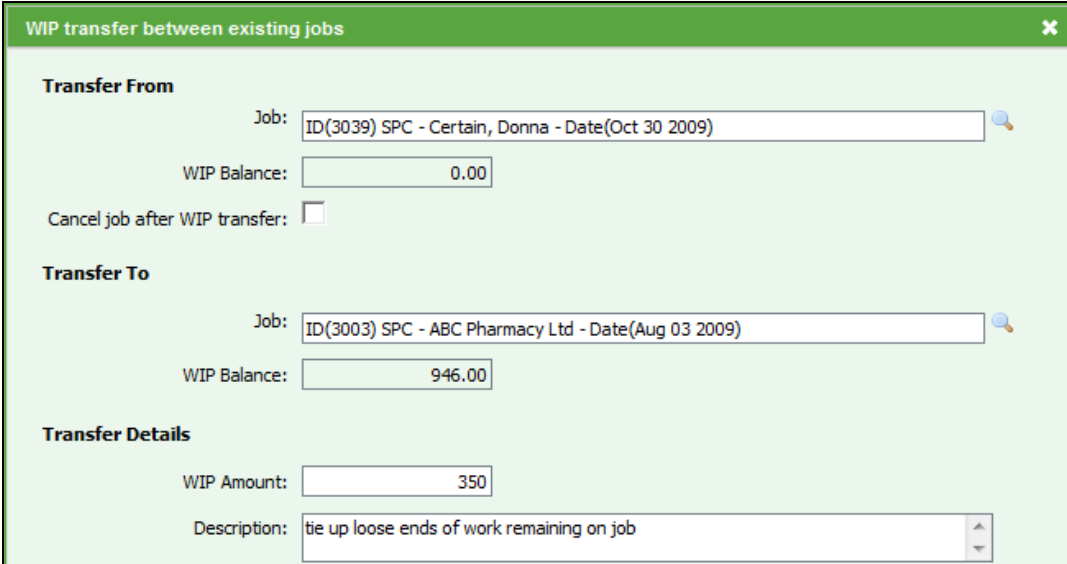
Description: tie up loose ends of work remaining on job

Transferring WIP from the job you have open to another job already in the system

Transfer WIP from existing job to current job

You might prefer to transfer WIP from an existing job to the job you have open. To do this:

1. Select **Jobs** → **Jobs**.
2. Click the row of the required job to open it.
3. Click **WIP Transfer**.
4. Click **From existing job into current job**.
5. Click the search  icon beside the first *Job* field to select the existing job you wish to transfer WIP from (if required).
6. Tick **Cancel job after WIP transfer** if you wish to cancel the source job once you have transferred the WIP.
7. Enter the WIP amount you wish to transfer in the field provided.
8. Add a description about the transfer in the field provided.
9. Click **Save**.



WIP transfer between existing jobs

Transfer From

Job: ID(3039) SPC - Certain, Donna - Date(Oct 30 2009)

WIP Balance: 0.00

Cancel job after WIP transfer:

Transfer To

Job: ID(3003) SPC - ABC Pharmacy Ltd - Date(Aug 03 2009)

WIP Balance: 946.00

Transfer Details

WIP Amount: 350

Description: tie up loose ends of work remaining on job

Transferring WIP from an existing job in the system to the job you have open