

**PLATINUM BILLING**  
**BILLING TODAY - DASHBOARD - CLIENTS**

- **Billing Worksheets or Mass Billing**
  - T&M, Fixed Fee, Retainer, Media
  - Client record defaults and Project settings control
- **Invoices: Generate, Approve, Print or Email**
- **Views**
  - Invoices, Receipts, Clients, EBW, related data
- **Dashboard -AR aging YTD or MTD**
- **Clients: Project, billing, tax defaults**

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**PLATINUM BILLING TODAY**  
**ELECTRONIC BILLING WORKSHEETS**

- **Billing defaults on Client record**
  - One Invoice per Client or Campaign= Master/child
  - Option to include Retainers on master
- **Billing Method on Project**
  - Time and Material; Fixed Fee; Retainer
- **Generate, AE completes review; approve**
  - EBW appear in lists based on status
- **Approved- Ready to Generate Invoice**

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**PLATINUM BILLING TODAY**  
**MASS BILLING**

- **Time and Materials**
  - Through date; options to include
  - Generate -one invoice per/one line per
- **Fixed Fee**
  - Expenses included or not
  - Billing schedule- date or task complete
- **Retainer**
  - Define; Extras separate or on same invoice
- **Media**

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**PLATINUM BILLING TODAY**  
**CLIENT INVOICES GENERATED**

- **Waiting to be Submitted**
  - Transaction Preferences to set default approver
- **Waiting for Approval**
  - Mass approve or one-by-one
- **Invoices to Print or email**
  - Print- download or external email; Email from WMJ
- **Scheduled Invoices**
  - Generate scheduled (also in Accounting Today)

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**BILLING DASHBOARD INFO/GRAPHS**  
**YEAR-TO-DATE OR MONTH-TO-DATE**

- **Revenue for Month**
  - Drill into detail
- **Aging**
  - Detail - Re-Email Aging Invoices
- **Current Open Amounts**
  - Drill into details
- **Write Off / Difference from Original Amounts**

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