Unfinalizing, Editing, and Reprinting Bills

Overview

This guide shows you how to unfinalize, edit, and reprint invoices in CMPOnline. Keeping your billing ledger accurate is important, so use these step-by-step instructions whenever you need to fix billing mistakes or manage updates.

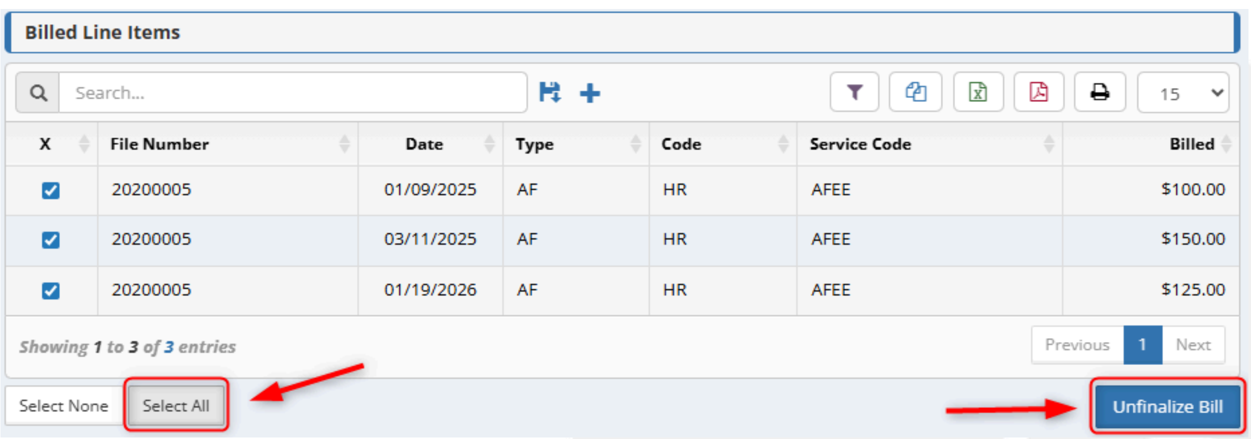
Unfinalizing a Bill

Unfinalizing allows users to reverse a finalized bill back to an editable format. This is necessary when an invoice contains errors that must be resolved.

Follow these exact steps to complete the unbilling process:

- Navigate to **Accounting > Billing > Open Bills**.
- Locate the bill needing modification.
- Click the **Unbill** button.
- From the grid, check the entries needed, or choose **Select All** to unfinalize the entire bill.
- Click **Unfinalize Bill** and confirm by clicking **OK**.

Tip: *If you simply need to remove or correct a single ledger item, select only that specific entry to unbill.*



Editing and Rebuilding Invoices After Unfinalizing

Once items have been successfully unfinalized, they return to the unbilled ledger where they can be corrected or deleted.

- Navigate to **Case File > Financial > Billing > Unbilled**.
- Select the entries and click edit to modify or delete to remove it from the unbilled queue.
- If all bills have been unfinalized, reprint the bill with your adjustments by navigating to **Accounting > Billing > Print Bills** and verify accuracy before sending it to print.

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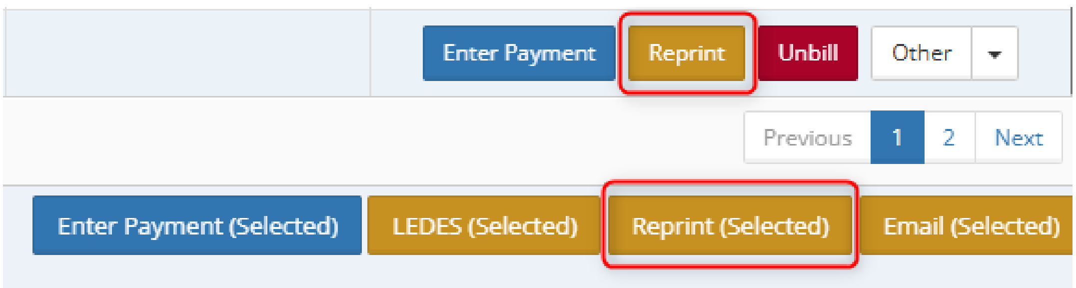
Reprinting a Bill

If you partially unbilled entries and simply need to reprint the bill after the entries were deleted in the step above, simply reprint the bill by navigating to **Accounting > Billing > Open Bills**.

Tip: *If you are reprinting one bill, you can click the Reprint button on that line. If you need to reprint multiple bills, select the desired bills and click Reprint (Selected) at the bottom of the screen.*



Void Finalized Bills

Once a bill has been voided, it will no longer be considered an active bill and will be excluded from billing processes and reports.

From the Case File Menu:

- Navigate to **Case File > Financial > Billing > Billed**.
- Select the bill you wish to void, then click **Void Selected Bill** in the bottom left corner of the grid.
- When the Void Bill? confirmation window appears, click OK to complete the process.
- Verify that the bill status has been updated to ensure the bill was successfully voided by Navigating to **Case File > Financial > Billing > Voided**.

From the Accounting Menu:

- Navigate to **Accounting > Billing > Open Bills**.
- Find the finalized bill you wish to void, then click the **Other** drop-down menu and select **Void**.
- When the Void Bill? confirmation window appears, click OK to complete the process.
- Verify that the bill status has been updated to ensure the bill was successfully voided by Navigating to **Accounting > Billing > Voided Bills**.

NOTE: If you need to restore a voided bill, navigate to Accounting > Billing > Voided Bills. Locate the bill you wish to restore and click Un-Void next to the bill. Once the bill has been un-voided, it will be returned to the Accounting > Billing > Open Bills screen and will again be available for normal billing processes.

Questions?

https://casemasterpro.com/software-support/
support@casemasterpro.com | (386) 675-0177