



NEW AMKids Billing Invoice



Presented by
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Why a new template?

- To make the billing process even easier for you and for AMIkids
 - To integrate with our database



Changes at a Glance

- **NEW Client Tab**

 Separating a troubled past from a bright future.		Unknown Provider			Clear previous billing entries for all clients.	
CLIENT INFORMATION Enter as it appears on authorization form - no nicknames				Invoice Summary	Help	
DJJID	First Name	Last Name	Actions			

- **NEW Button Functionality**



- **More Automation = less time spent completing the invoice and less errors**



Workbook Security

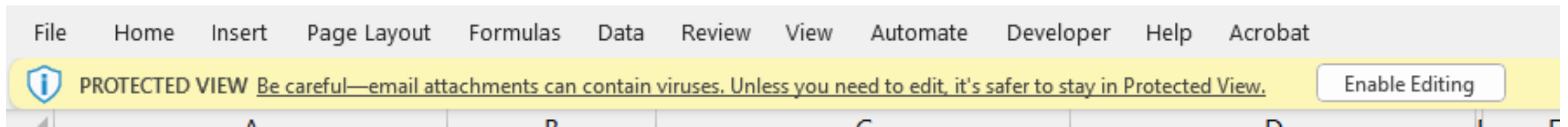
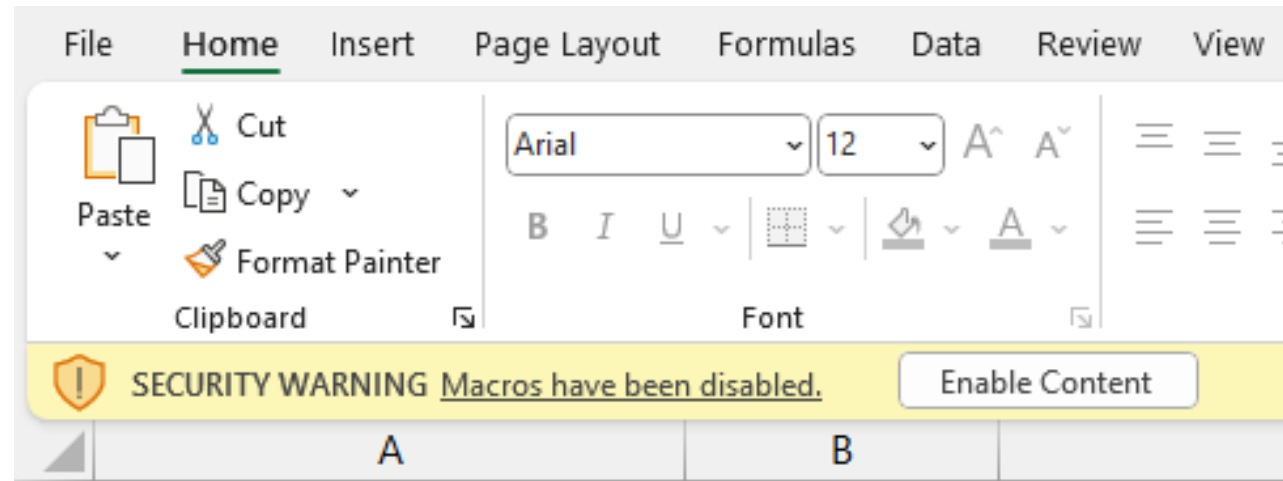
These workbooks have Macros and coding which are essential to making the workbook perform properly

Steps you should take before using the new workbook

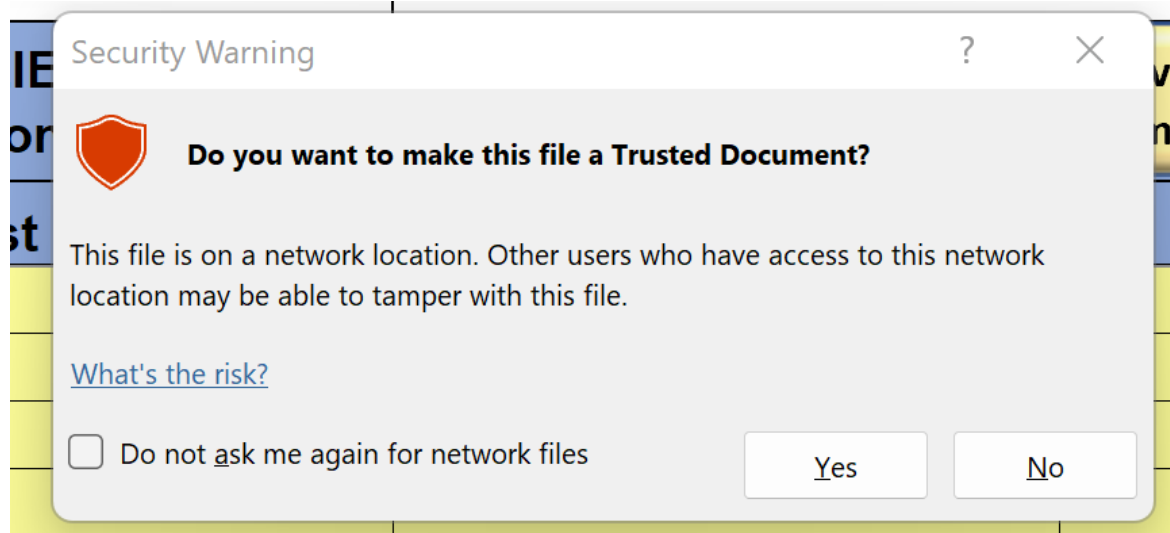
- 1. Save workbook first (before opening)**
- 2. Enable Content**
- 3. Trust Source**
- 4. Contact your IT department (if you have one)**



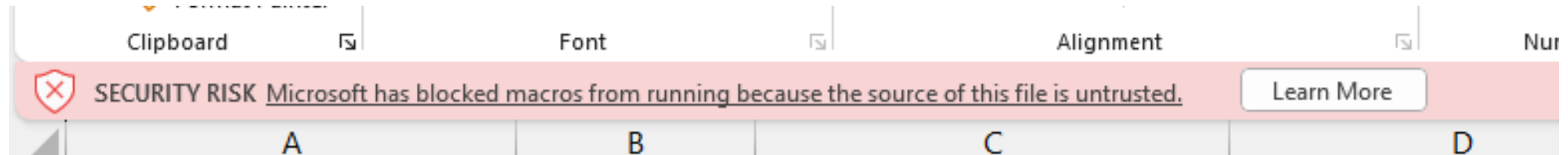
Workbook Security cont.



Workbook Security cont.

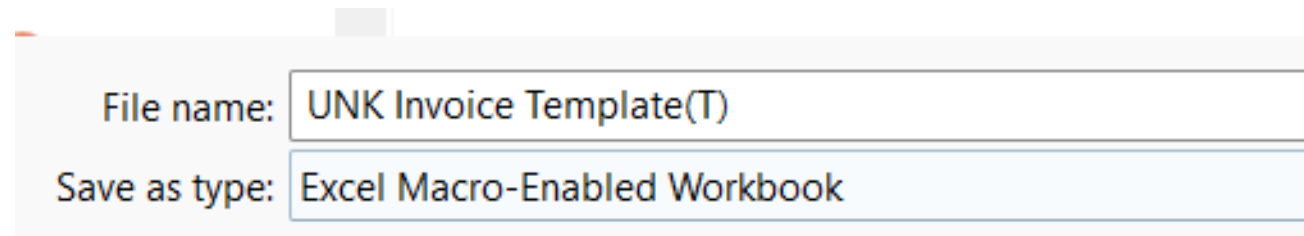


Workbook Security cont.



- To make this a trusted document follow these steps
 1. File
 2. Options
 3. Trust Center
 4. Trust Center Settings
 5. Trusted Documents
 6. Checking "Allow documents on a network to be trusted"

Workbook Security cont.

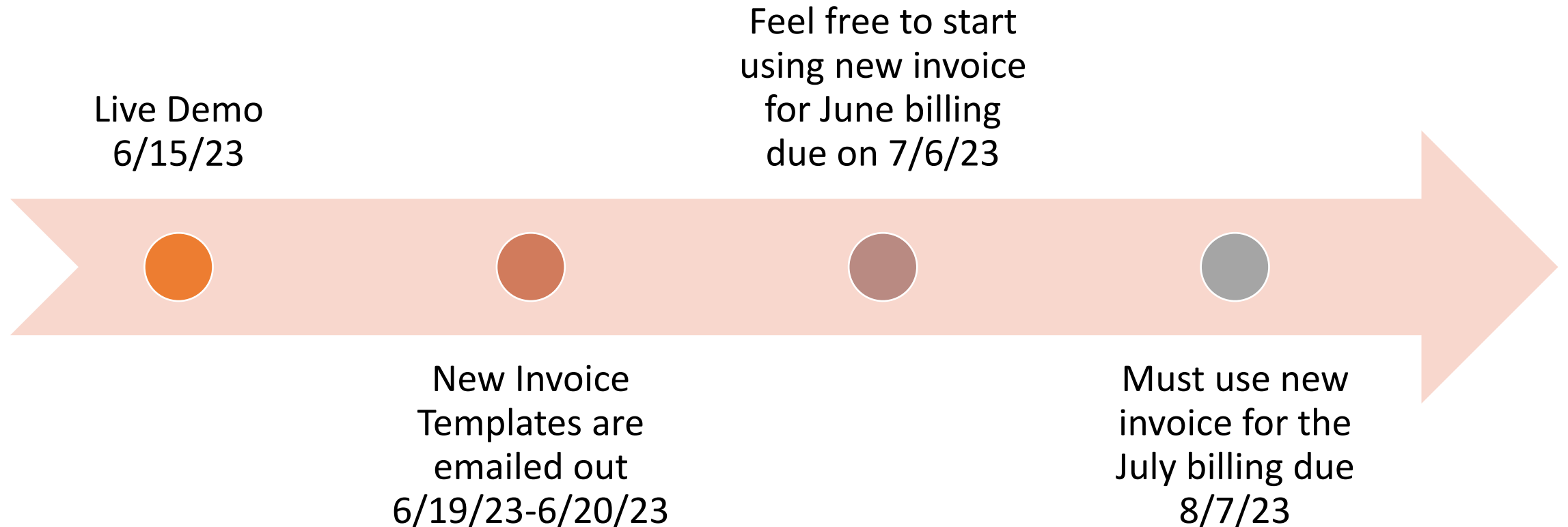


A screenshot of a file save dialog box. The 'File name' field contains the text 'UNK Invoice Template(T)'. The 'Save as type' dropdown menu is open, showing 'Excel Macro-Enabled Workbook' as the selected option.

- **Anytime the document is saved it must remain as an excel macro-enabled workbook**
- **The workbook will not work if it is saved as any other type of file**

Live Demo of New Invoice

Timeline of Implementation



Questions?



Resources

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