

How to Disable Invoicing

Thu, Mar 31, 2022 [Billing Setup](#)

The following will require two steps: disable invoicing, and remove invoices from a return. A default billing schedule is required, so check in Office Setup/General.

To disable invoicing

NOTE: When disabling invoicing, the program will not calculate itemized billing amounts. Many partners request this to have ability to enter their prep fee on a bank account.

1. From the **Setup** menu, click **Billing Setup**.
2. Select the **Disable Invoicing** check box.
3. Click **OK**.

The screenshot shows the 'Billing Scheme' dialog box. At the top, there is a dropdown menu for the Billing Scheme (set to 'TEST'), a Billing ID field (set to '1001'), and buttons for 'Delete' and 'Save As...'. Below this is a tabbed interface with tabs for 'General', 'Form Billing', 'Worksheet', 'Line Items', 'Discounts', 'Custom Charges', and 'Custom Settings'. The 'General' tab is selected and highlighted with a red box. Under the 'General Office Information' section, there are fields for 'Office Information to be printed on each billing invoice' and 'Company Information from Office Setup' with a 'LOAD' button. Below this is a table of settings:

State Sales Tax Rate	<input type="text"/>	Tax Preparation Discount	<input type="text"/>
Self Prepared Flat Fee	<input type="text"/>	Default Hourly Rate	20.00
No Prior Year Balance on Invoice	<input type="checkbox"/>	Disable Invoicing	<input checked="" type="checkbox"/>
Don't Bill for Sch A when using STD Deduction	<input type="checkbox"/>	Bill For EF Forms Only	<input type="checkbox"/>
Turn Off Default Bank App Disbursement Options	<input type="checkbox"/>	Collect Tax on Billings?	<input type="checkbox"/>
Prevent transmit on returns with a balance due	<input type="checkbox"/>	No Prior Year Preparation Fee on Invoice	<input type="checkbox"/>

At the bottom, there is a note: '* To apply the updated billing scheme to an existing or current return, press CTRL+U while in the return'. There are also 'OK' and 'Help' buttons.

To remove invoices by reloading billing on existing returns

NOTE: On all returns created after disabling invoicing, no invoice will be present. To remove the invoice from existing returns, you will need to reload billing.

1. Open the return in question.
2. On the **Return** menu, click [Re-Load Billing](#), and the invoice will be removed.

Online URL: <https://kb.erosupport.com/article-87.html>