Create a Job Progress Invoice

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When progress billing a customer, after each invoice is saved, this automatically reduces the amount left to invoice. When the next invoice is created, only the balance of what is left to invoice will auto-fill into the invoice form.

To create a Job Progress Invoice, follow the instructions below.

1. From the Main Application Menu navigate to Job Management and select the Job Queue menu option.

2. The Open Job List will be displayed. Click the Ready to Invoice button from the function buttons located at the top of the Open Job List.

3. All Jobs which are ready to be invoiced will be displayed in the grid area. In the upper right of the list, a count of Jobs to invoice will be listed. In the lower right area the total Install and RMR charges available to be invoiced is shown.

4. To invoice a Job on the list, highlight the Job in the grid area then click the Invoice button located at the lower right of the form or just double-click on the Job row in the grid area.

5. The Job Invoice form will be displayed. All charges for the Job that have not yet been invoiced will fill into the invoice lines section of the invoice form. To partially invoice for the charges that automatically fill into the body of the invoice, you have two options:

- For Install Charges, change the quantity of the line item or
- Type in the total dollar amount to be invoiced for the Install Charge line in the Rate field.

- Confirm the information in the Invoice Header is correct; make any changes if necessary.
- If Recurring Charges are being invoiced at this time, make the appropriate date selections in the Bill RMR area of the Invoice Header. If Recurring Charges are not being invoiced at this time, un-check the Bill RMR option in the Invoice Header; all Recurring Charges will automatically be removed from the Items form.
- Navigate to the Parts tab and confirm Part Charges, if any. If some part lines will not be included on this Job Invoice, highlight the Part line then click the keyboard delete key. If any part lines are being partially invoiced, change the quantity column of the appropriate Part line to indicate the quantity of the part to be invoiced at this time. Do not enter a quantity less than 1.
- Navigate to the WIP tab (if displayed); review the amounts of WIP that will be relieved with this invoice - make any necessary changes to the allocation percentage(s).
- Navigate to the Invoice Footer; accept or change the default Invoice Description. Select or type in a Contact name if needed; this name will print on the invoice. Type in a note in the Memo field if desired; remember this memo field will print on the invoice. The more information provided to your customer relative to the invoice charges, the less likely the invoice will be challenged by your customer.

- If the Invoice will be printed immediately, un-check the Add to Print Queue option.

6. When finished filling in all required information, click the Save button to post the invoice to the G/L and the Customer's account.