Percentage Invoicing

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Percentage Invoicing Overview

Percentage Invoicing Job Types are typically used on government or general contractor type jobs where under the terms of your customer contract, your company is required to invoice a percentage of the total contract amount at pre-determined times throughout the life of the Job.

SedonaOffice provides the functionality to meet this requirement within the Job Type setup. To be able to use this invoicing method, the Job Type must be flagged as a Percentage Invoicing Type in SedonaSetup. For more information on setting up Percentage Invoicing Job Types, please refer to the **SedonaSetup topic folder / Job Type Details**.

When creating a new job and selecting a Job Type which is flagged for Percentage Invoicing, you should navigate to the Job Tasks form to review the default invoicing percentages. If your contract with your customer dictates the invoicing is different than the default percentages on the defaulted task lines, you will need to make the modifications prior to generating the first invoice for the Job (see example below).

Once the first task which has the Invoice Flag set to Y has been approved, the first percentage invoice may be generated. In the example provided, the first invoice will be generated for 30% of the total installation charges.

On the first percentage invoice, the RMR (if any) will automatically auto-populate into the invoice form. If you do not want to start billing for recurring services at this time, make certain to un-check the Bill RMR checkbox.

As the Job progresses and additional invoicing tasks are approved, additional Job Invoices may be generated until the job is completely billed. Typically on the last invoice, the RMR charges are invoiced, however you may choose to do this on any percentage invoice or invoice the RMR charges on a separate invoice.

In the screen shot below, the Job Type is flagged for Percentage Invoicing. Percentage Invoicing type jobs are easily distinguished by the % column displayed in the task list; only Percentage Invoicing Job Types have this column present. This Job will be invoiced three times; once for 30% of all charges after task line 2 is approved, again for 20% after task line 3 is approved, and the remaining 50% after task line 5 is approved.

□ **For Jobs using the Percentage Invoicing method, do not create any change orders for the job after the first job invoice has been created. The software was not designed to handle change order amounts in conjuction with percentage invoicing.**

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Creating a Job Percentage Invoice

To create a Job Percentage 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.

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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. The Quantity field will automatically fill in with the percentage assigned to the last approved Job Task Line flagged for invoicing. The quantity field may not be modified for these types of Jobs; this is to keep the Job on the pre-defined invoicing schedule as setup on the Job Task list.

Click the Save button at the lower right to post the invoice.

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