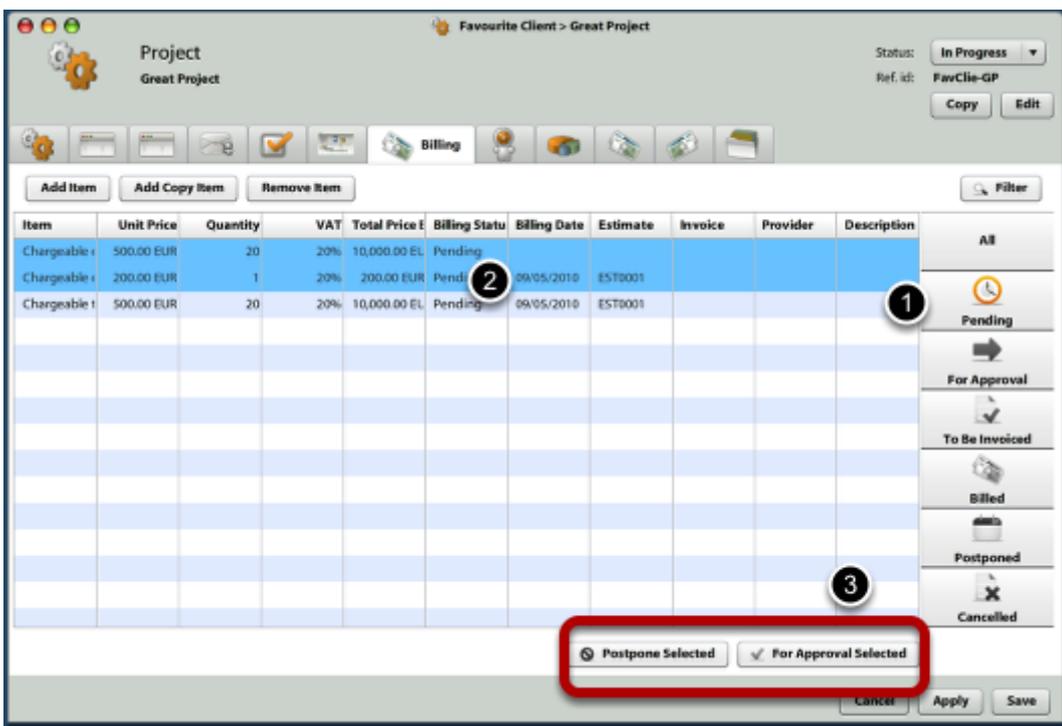


Project Billing

In order to send invoices to your clients, you may collect source data for invoicing from Atollon Octopus Billing tool.

Billing tools allows Project Managers revise what Billing Items are ready to be billed and send them for billing.

Select what project Billing Items should be invoiced



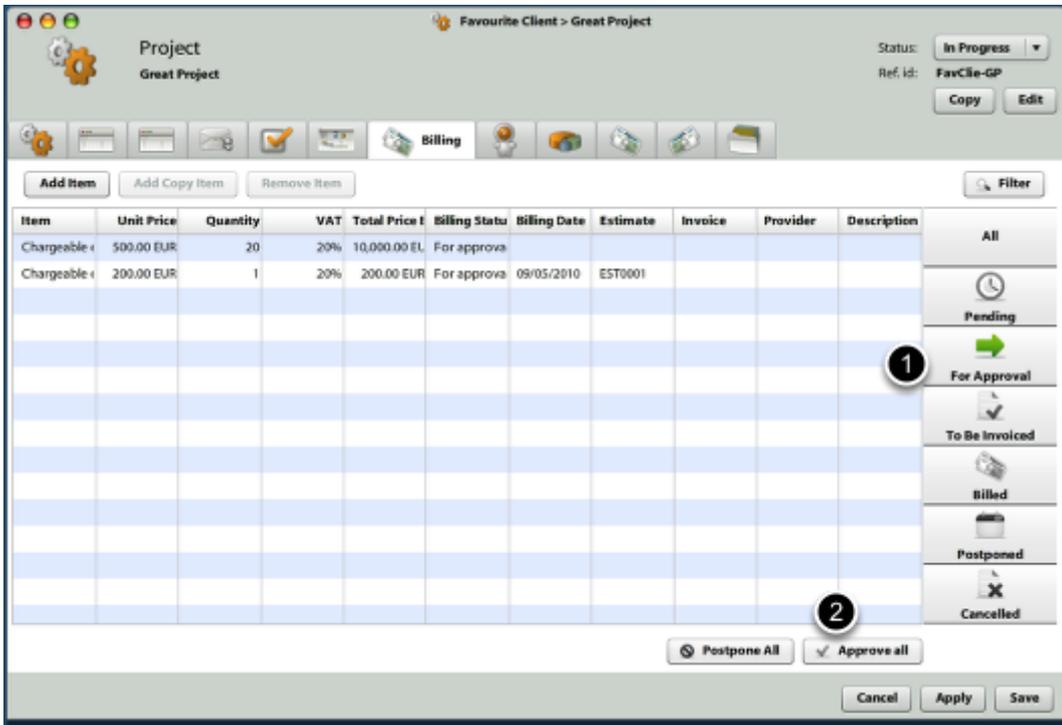
The screenshot shows the 'Project Billing' interface for 'Great Project'. The table below lists billing items with columns for Item, Unit Price, Quantity, VAT, Total Price, Billing Status, Billing Date, Estimate, Invoice, Provider, and Description. Three items are listed, all with a 'Pending' status. A red box highlights the 'Postpone Selected' and 'For Approval Selected' buttons at the bottom. A sidebar on the right contains buttons for 'All', 'Pending', 'For Approval', 'To Be Invoiced', 'Billed', 'Postponed', and 'Cancelled'. Numbered callouts 1, 2, and 3 point to the 'Pending' button, the 'Billing Status' column, and the 'For Approval Selected' button respectively.

Item	Unit Price	Quantity	VAT	Total Price	Billing Status	Billing Date	Estimate	Invoice	Provider	Description
Chargeable	500.00 EUR	20	20%	10,000.00 EU	Pending					
Chargeable	200.00 EUR	1	20%	200.00 EUR	Pending	09/05/2010	EST0001			
Chargeable	500.00 EUR	20	20%	10,000.00 EU	Pending	09/05/2010	EST0001			

Once Project Manager finds out that some of the Billing Items should be invoiced, he/she should open the project, and:

- 1.) Select what Billing Items are **Pending**
- 2.) **Select** what **Billing Items** should be invoiced (or sent for Approval)
- 3.) Click on **For Approval Selected (All)** button

Approve Billing Items for invoicing



Revise whether project Billing Items are ok for invoicing. If they are, submit them to be invoiced.

- 1.) Select **For Approval** items
- 2.) Click on **Approve all (selected)** button

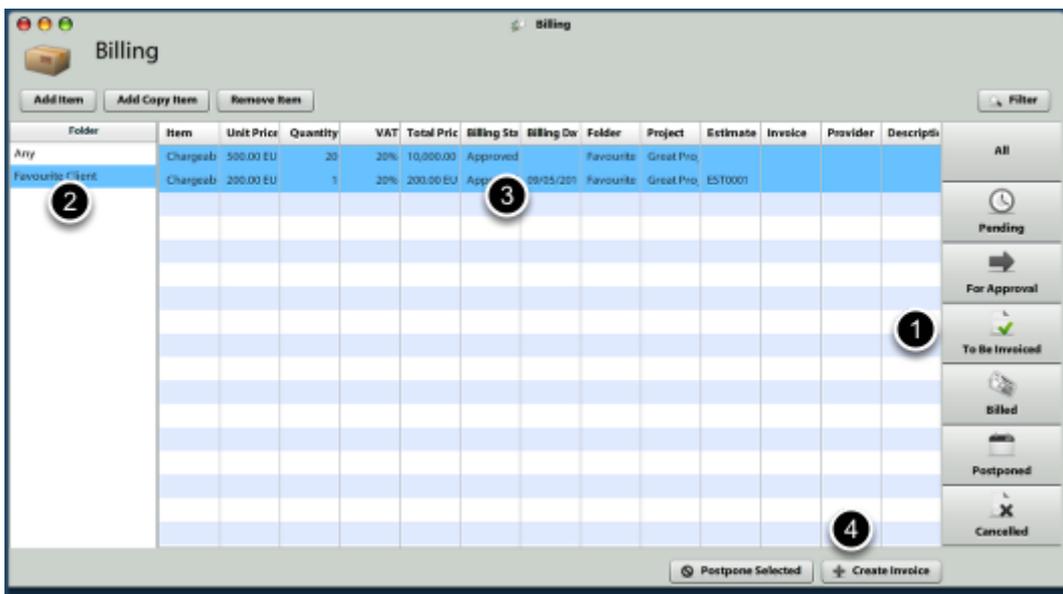
Invoice approved Billing Items: Open Billing



First open **Billing** application.

Billing application is used to revise and invoice **Billing Items**.

Invoice approved Billing Items: Select client / project



In order to select Billing Items for invoicing:

- 1.) Select **To Be Invoiced** button
- 2.) Select which **client** (folder) you would like to be invoiced
- 3.) Select all items you would like to invoice
- 4.) Press **Create Invoice** button

Revise & Submit the created Invoice

Issued Invoice - Ref.Id.: FavClie-GP

Context: * Favourite Client > Great Projec

Status: * Issued

Number:

External number:

Journal: Issued Invoice

Currency: EUR 1

Issued date: 09/05/2010

Due date: 09/19/2010

Taxation date: 09/05/2010

To be paid: 12240 EUR

Id: FavClie-GP

Provider: Atollon Lagoon Organization

Customer: Favourite Client, Short Road 12, Slig, Ireland (Ireland or Eire)

Comment:

Name	Unit Price	Qty.	VAT	Amount	incl. Tax
Chargeable expense	200.00 EUR	1	20%	200.00 EUR	240.00 EUR
Chargeable expense	500.00 EUR	20	20%	10,000.00 EUR	12,000.00 EUR

Add Transaction Remove Transaction

Total: EUR 10,200.00 Incl. VAT: EUR 12,240.00

Print Cancel Apply OK

Once you clicked on **Create Invoice** button in previous step, new **Issued Invoice** is generated. You should revise all information pre-generated by the **Billing** tool.

Information such as invoice **Journal**, **Provider** and **Customer** may be automatically pre-filled differently based on **Invoice Settings** on project. Please see the step below to change these project Invoice Settings.

Once you click on Ok, the invoice is generated.

If you want to directly send / print the Invoice, press **Print** button.

Adjust project Invoice Settings

Business Case

Business Case

Expected close date: 03/16/2020

Probability: 0 %

Provider: ACME org. X

Invoice to:

New Delete

Name

If you want to adjust Invoice Settings on particular project, open the "Deal" tab project and adjust Provider / Invoice to contacts. These are optionally allowed / disallowed in Layout settings of Project (in Context Settings).

Please note that these values may be also adjusted in **Project Template** settings to make creating & setting new projects easier.

Revision #1

Created 16 March 2020 16:25:42 by Jan Safka

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