Working with Progress Billing

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This guide explains progress billing for a project or an order. It is intended for general users.

For long-term projects or larger orders, you can use progress billing. Progress billing is sending invoices for portions of the work as milestones are achieved. Progress billing records generate deposit invoices for the customer (https://aace6.knowledgeowl.com/help/handling-customer-deposits). When you open a progress billing invoice, it credits a deposit on the General Ledger. The final invoice issued serves as the revenue-recognition invoice, reversing the existing deposits.

Invoices generated from progress billing records are not linked to shipments. If you first create an invoice using progress billing, then ship a shipment, aACE will not automatically generate an invoice for that shipment. This applies even if your system is configured with the preference Auto-generate invoices on shipment. If you ship a shipment before creating a progress billing record, aACE will automatically generate a regular invoice.

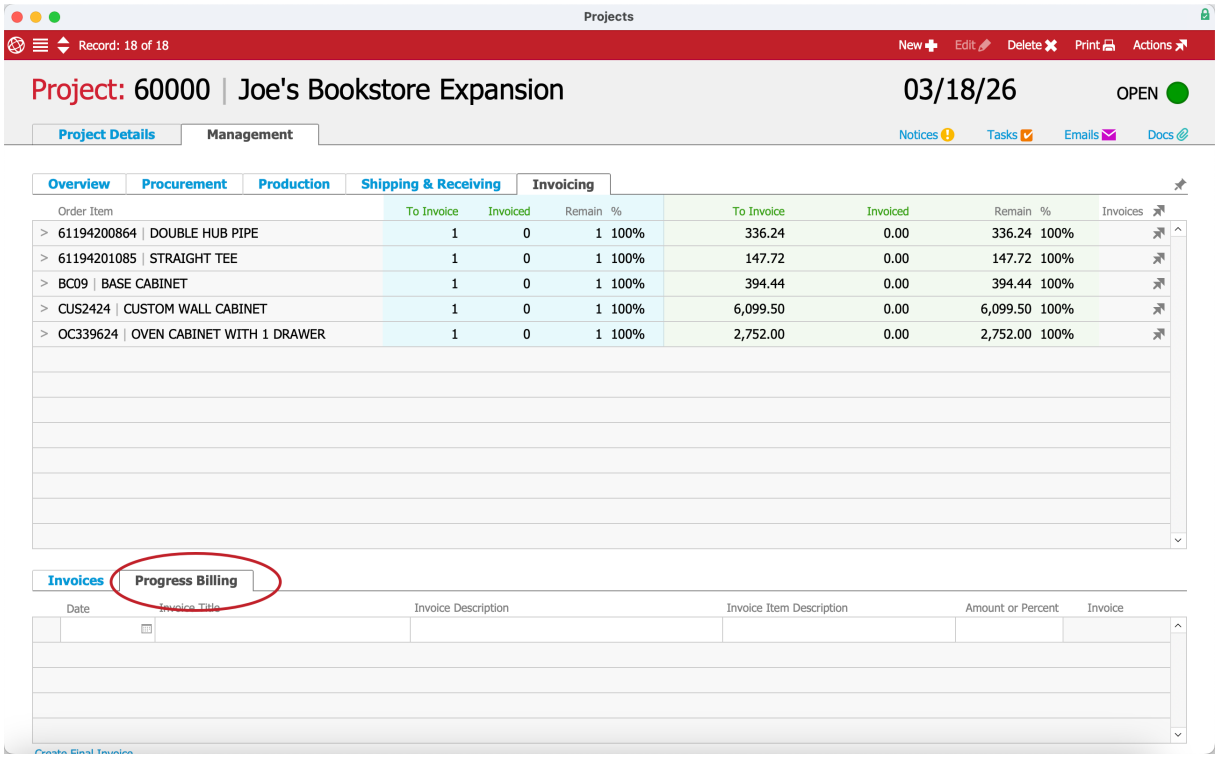
Accessing Progress Billing

You can access progress billing from either the Projects or Orders module.

Progress Billing on Projects

To access progress billing for projects:

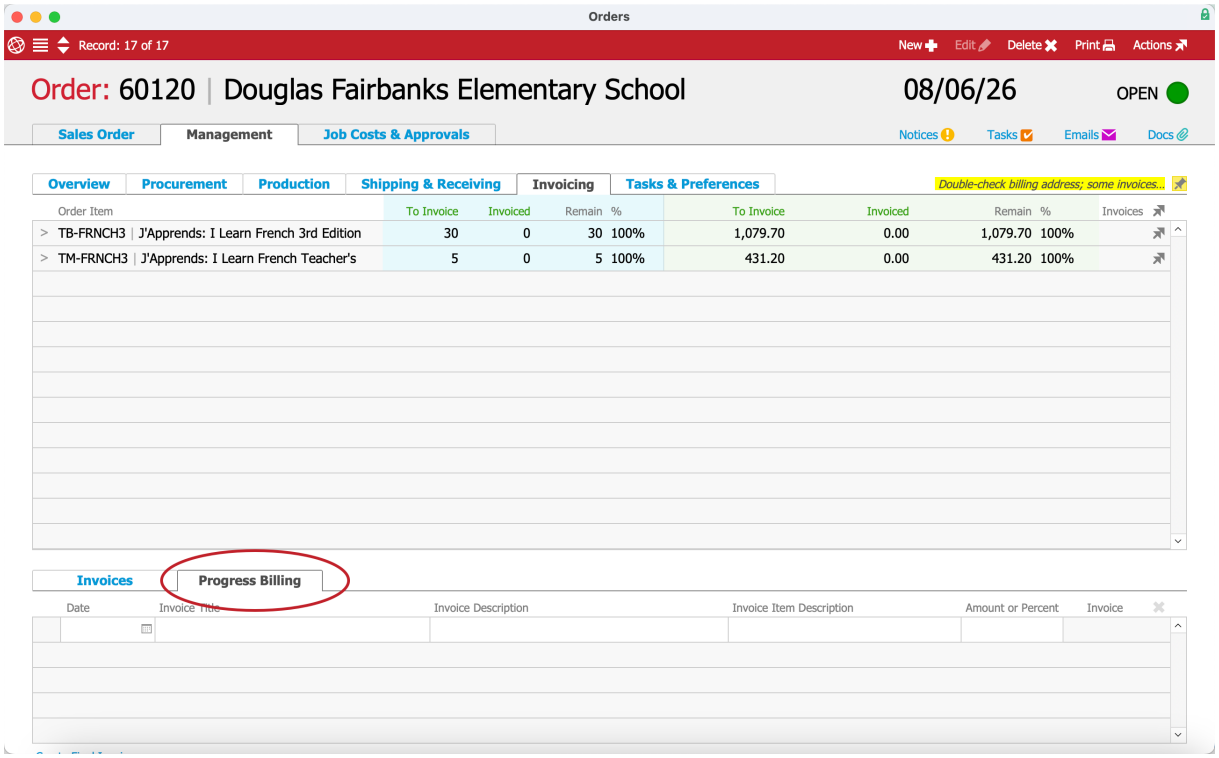
1. From the Main Menu, go to **Order Management** > **Projects**.
2. Use the Quick Search bar to locate the project, then select the **Go-To icon** (>).
3. Select **Management** > **Invoicing** > **Progress Billing**.



Progress Billing on Orders

To access progress billing for orders:

1. From the Main Menu, go to **Order Management** > **Orders**.
2. Use the Quick Search bar to locate the order, then select the **Go-To icon** (>).
3. Select **Management** > **Invoicing** > **Progress Billing**.

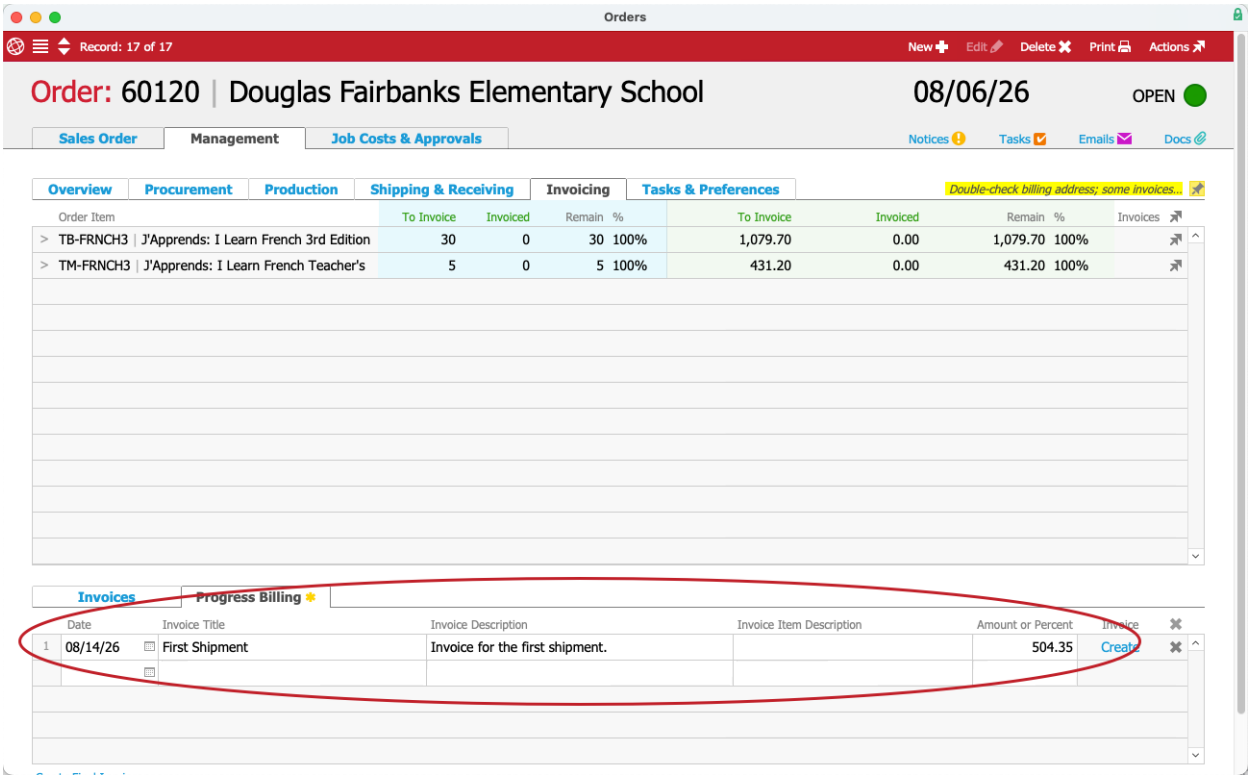


Creating Invoices with Progress Billing

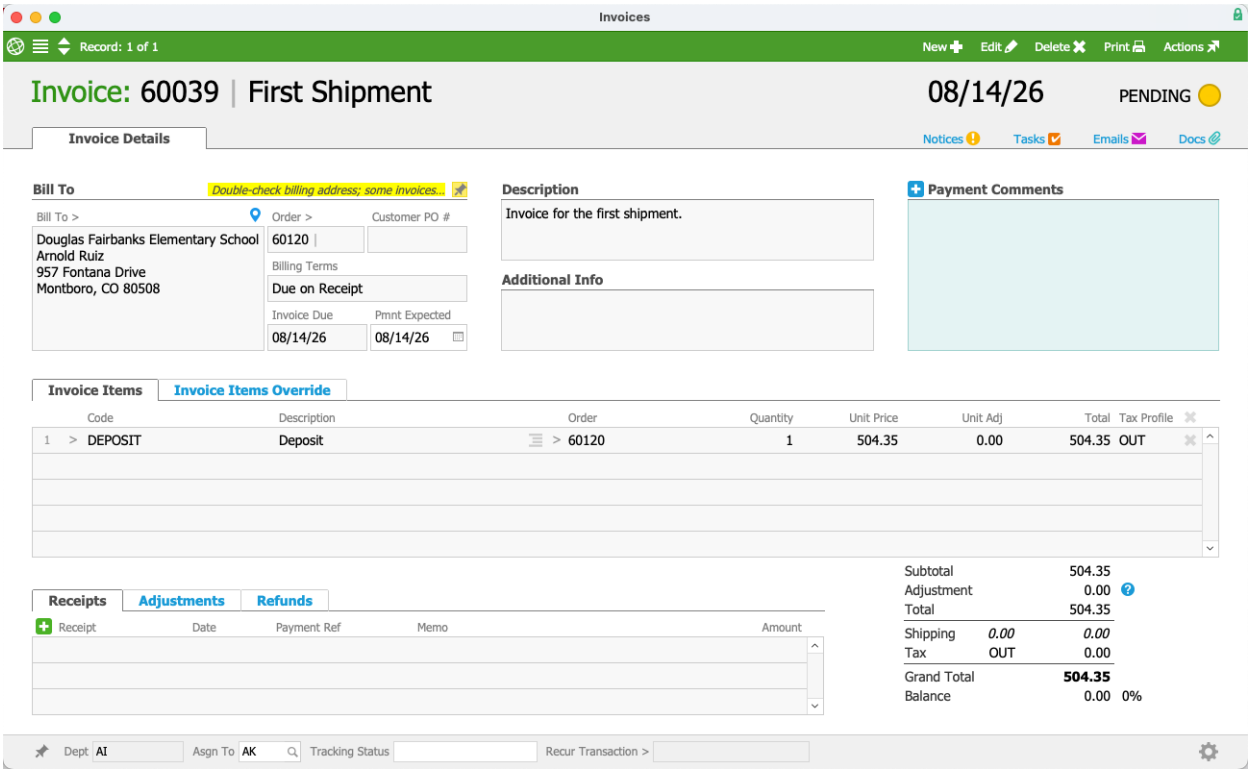
Creating Progress Billing Invoices Manually

You can manually create progress billing invoices. At the Progress Billing sub-tab of an order or project, enter the following information for the invoice:

- Date
- Invoice Title
- Invoice Description
- Invoice Item Description (if applicable)
- Amount or Percent
- Invoice



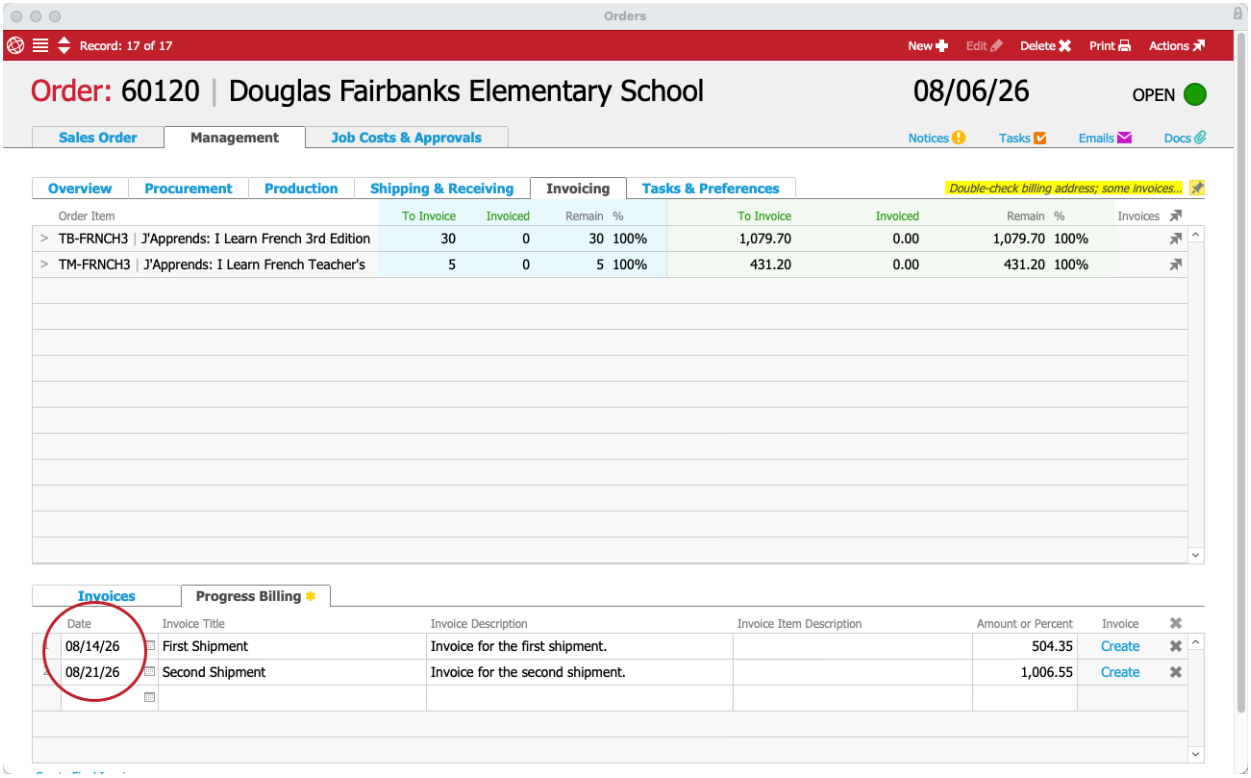
Then, select Create. aACE generates the progress billing invoice with the DEPOSIT line item code showing the amount or percentage you specified.



Automating Progress Billing Invoices with Automation

Schedules

You can enter data for multiple progress billing invoices, then let aACE process them at specific times. When the Auto-Generate Progress Billing Invoices automation schedule runs, aACE reviews open orders and projects for progress billing invoices with the current date. For these records, it automatically generates the deposit invoice. aACE leaves the invoice pending for a manual review.



Your system administrator can configure this automation schedule (https://aace6.knowledgeowl.com/help/configuring-automation-schedules) based on your organization needs.

Completing Progress Billing

When the project or order is at completion, you can generate the revenue-recognition invoice from the Progress Billing section by selecting Create Final Invoice. The project or order can be completed even if the entire payment has not been covered by progress billing invoices.