

Sage Timberline Office



Billing

Billing can accommodate all your customer invoicing needs.

Use it to automatically produce time-and-material, cost plus, lump sum progress billing and unit priced invoices according to your contractual requirements. Or, quickly and easily create free-form invoices independent of your contracts at any time.

For cost-based billings, Billing collects and tracks costs from other Sage Timberline Office applications for inclusion in your invoices. Billing automatically applies user-defined billing rates and markups to cost items, then lets you change, hold, write up or down work-in-progress amounts prior to invoicing. For fixed-priced invoices, Billing gives you a worksheet to enter amounts, percent complete and units to bill. For free-form invoices, you simply enter billing information directly into an invoice template on the screen.

Billing lets you control the look and content of your invoices to meet your customer's needs. After invoices are produced, the information is sent to Accounts Receivable for cash receipt processing.

Following is a detailed list of the features Billing offers to help you produce timely, accurate invoices:

Cost-based contract billing

- Generate billings for time and materials and cost plus contracts.
- Automatically post costs from Job Cost, Accounts Payable, Payroll and Equipment Cost modules to Billing for use in invoice production.
- Define billable and nonbillable costs in a number of different ways, including by cost type, cost code, contract item, etc.
- Create markup tables to efficiently apply standard percents to labor, material, subcontractor, equipment, overhead and other cost types.
- Create billing rate tables to efficiently apply billing rates by cost type.
- Calculate billing rates using nearly 30 different key classifications (for example, job, employee, vendor, equipment type).
- Enter effective dates on rate tables and markup tables to control when Billing uses specific tables for calculation.
- Produce invoices for all unbilled work-in-progress (WIP) through a date you specify.
- Edit WIP information to adjust amounts prior to billing.
- Bill standard items that are not associated with direct costs (for example, inventory items or service orders).
- Take advantage of invoice add-ons (for example, charges or deductions) to modify invoice amounts based on fixed amounts or percentages.
- Automatically calculate sales tax based on tax information stored on the contract.

Fixed-price contract billing

- Generate billings for progress billing, unit priced and lump sum contracts.
- Automatically calculate retainage using different retainage percents by contract item.

BENEFITS

- Quick and easy billing management for all your customer invoicing needs.
- Save valuable time by setting up user-defined billing rates and mark-ups to cost items.
- Highly customizable cost based and fixed price contract billing allows total control of YOUR billing processes.
- Select invoices from an extensive library of predetermined formats, or create your own for a look unique to your business.

