

Using billing review stages as a project manager

(ajeraComplete only)

Goal: As a project manager, use billing review stages as part of your invoice review process.

In this quick lesson

Step 1: Use billing review in the Project Command Center	2
Step 2: Preview the invoice	3

Your accounting staff has set up billing review stages for your firm and customized your Project Command Center for billing review.

This lesson describes how you can use billing review as a project manager.

Step 1: Use billing review in the Project Command Center

1. Click **Setup > Projects** and open your project.
2. Click the **Invoices** tab.

Depending on how your accounting staff set this up, the PM Action or BM Action notification check box is selected if you need to review the invoice.

Select the project you want to review.

This tab lists the invoices for the selected project.

Click to preview the invoice.

PM Action	BM Action	Prin Action	Acctg Action	Description	Billing Review Stage	Hours Budget	Hours Actual	Contract Amount
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Oakland Heights Medi...	Pre-review	935.00	476.00	134,500.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Step on Estate Kit...	PM Review 1	397.00	124.00	42,500.00
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			952.15	0.00	90,000.00
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			682.00	738.00	114,000.00

Invoice Detail	Billing Review Stage	Client	Project ID & Description	Invoice Number	Invoice Date	Amount
Draft						21,088.75
Preview Invoice	Pre-review	Dawson Develo	04-107 Oakland Heights Medical			21,088.75
Final						39,721.29
Preview Invoice		h Develo	04-107 Oakland Heights Medical	FC-Sep-11-000	10/01/11	4,610.17
Preview Invoice		h Develo	04-107 Oakland Heights Medical	00366	06/12/09	11,527.00
Preview Invoice		h Develo	04-107 Oakland Heights Medical	00363	05/13/09	23,584.12
						60,810.04

3. Click the **Preview Invoice** link. The Preview window appears.

Step 2: Preview the invoice

1. The Billing Review History window appears at the top of the Preview window.
2. If your accounting staff has set up the invoice format to include supporting detail, the preview will also include the pre-billing worksheet (which provides the same information as the Billing report).

The screenshot shows a software window titled "Preview - 04-107 Oakland Heights Medical Clinic (* Draft *)". At the top, there is a "Billing Review History" section with a table and a "Hide Review History" button. Below this is a "Pre-billing worksheet" with a table of invoice items. Three callout boxes provide instructions: "First, click to review the invoice." (pointing to a button), "Second, enter notes about your review (for example, corrections that need to be made)." (pointing to a text field), and "Third, select the next billing review stage." (pointing to a dropdown menu). A thought bubble contains the text: "Make sure that the information you enter is clear and complete so the next reviewer can understand it easily. For example, you may enter instructions such as, 'Hold WIP until next month.'"

Notes	Stage	Added	Author
Invoice created (Alera generated entry)	Pre-review	01/10/11 2:34 PM	

Description	Contract Amount	Percent Complete	Prior Billed	Total Billed	Current Billed
Schematic Design	26,100.00	100.00	26,100.00	26,100.00	0.00
Desian Documents	19,575.00	80.00	7,830.00	15,660.00	7,830.00

3. Click **Save**. If set up by your accounting staff, a selected notification check box in the Project Command Center (see step 1) or in the Client Invoice List will indicate that the invoice is ready for the next reviewer.

Summary

You now know the billing review steps to follow as a project manager.

To learn more about the billing review process, see the *Understanding the billing review process* quick lesson.