



Module 02 – Progress Billing
Chapter 07
GET JOB PLANNING LINES

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Progress Billings – Get Job Planning Lines

GET JOB PLANNING LINES

“Get Job Planning Lines” function helps to avoid copying/duplication of lines which have already been billed unlike “Get Billings” function. Once you have selected certain planning lines for the progress bill, the next time you use Get Job Planning Lines, it will show only those lines which are not a part of any requisition.

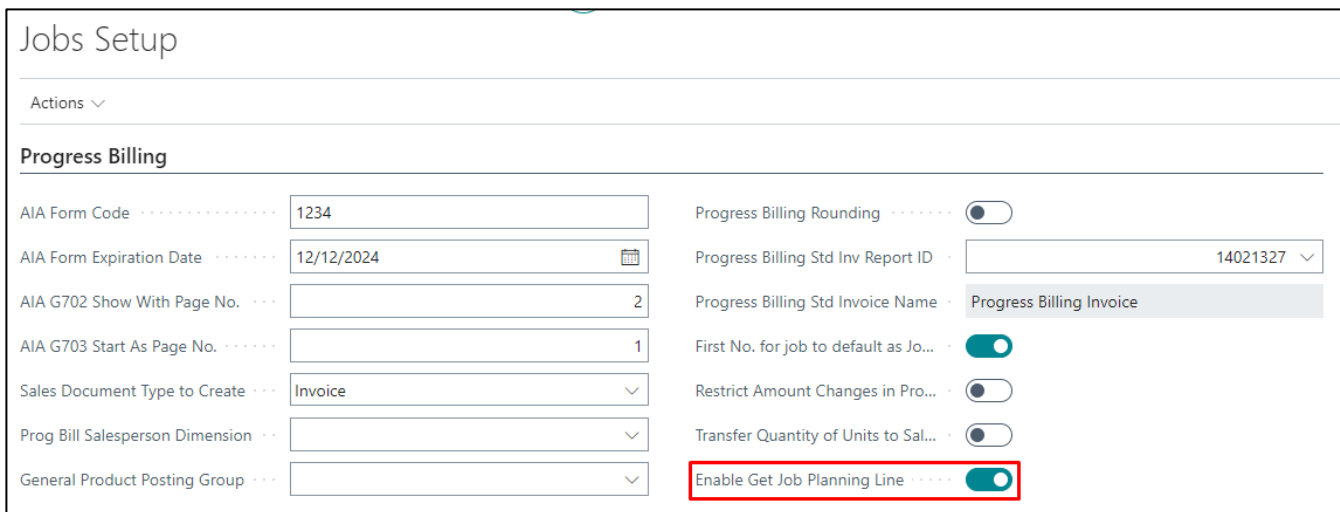
To use this button, we need to toggle it “ON” over job setup page under Progress Billing fast tab.

Attention: If this function is used on an existing requisition, it will show all the planning lines initially. Once you start selecting the lines for the requisition, those lines will get eliminated from the selection and the list.

1. Job Setup:

On the Jobs Setup turn ON the “**Enable Get Job Planning Line**” field under Progress Billing fast tab.

This feature will allow a user to select one or more Billable Job Planning Lines for the progress billing. Enabling this feature will disable the standard "Get Billings" function on the progress billing.

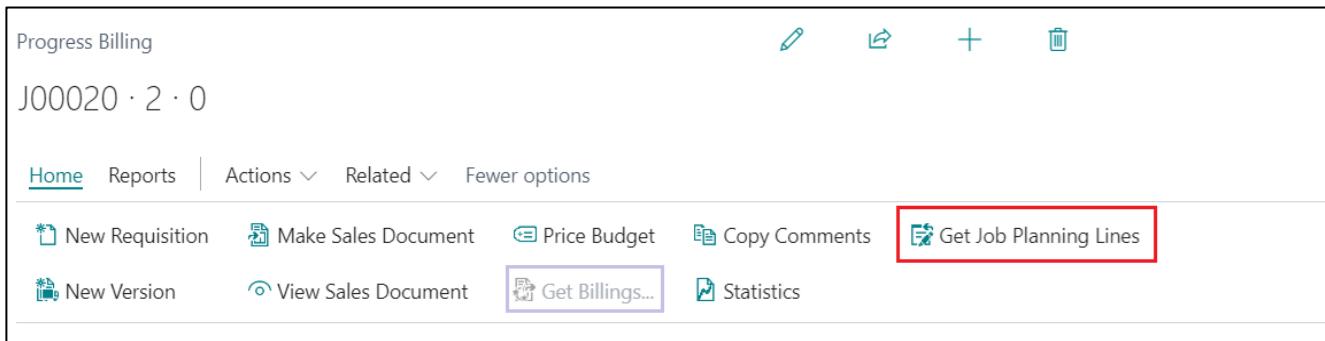


The screenshot shows the 'Jobs Setup' form with the 'Progress Billing' section expanded. The 'Enable Get Job Planning Line' toggle switch is turned ON and is highlighted with a red box. Other visible fields include AIA Form Code (1234), AIA Form Expiration Date (12/12/2024), AIA G702 Show With Page No. (2), AIA G703 Start As Page No. (1), Sales Document Type to Create (Invoice), Prog Bill Salesperson Dimension, General Product Posting Group, Progress Billing Rounding, Progress Billing Std Inv Report ID (14021327), Progress Billing Std Invoice Name (Progress Billing Invoice), First No. for job to default as Jo... (ON), Restrict Amount Changes in Pro... (OFF), and Transfer Quantity of Units to Sal... (OFF).

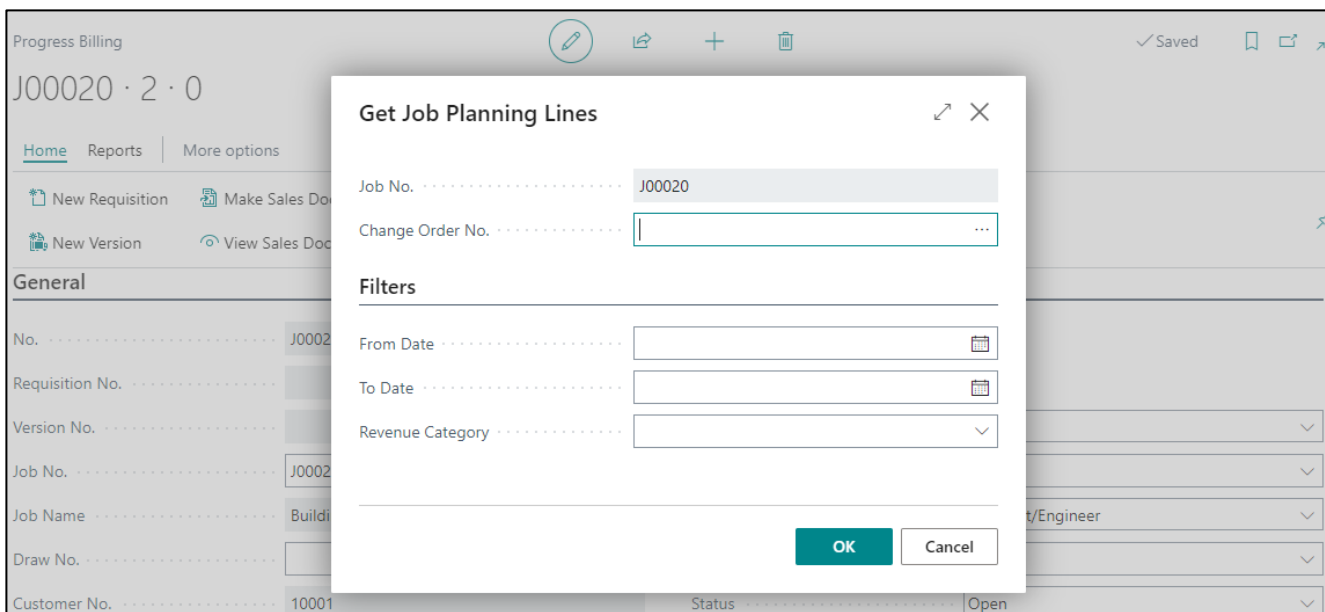
2. Progress Billings

Create a new Progress Billing Requisition. On the ribbon, you will now be able to see/use “Get Job Planning Lines”. Please note that, “Get Billings” option has been disabled.

Progress Billings – Get Job Planning Lines



Upon clicking Get Job Planning Lines, the system will open the window as below.



- The “Job No.” gets auto filled.
- Enter the “Change Order No.” if there are any change orders to this job that should get added to the requisition.
- Users can filter the planning lines list by entering the “From Date” from which you want to calculate the billings.
- User can filter the planning lines list by entering the “To Date” until you want to calculate the billings.
- User can filter the planning lines with “Revenue Category” if specified.

Once all required details have been entered, click on OK. This will show a list of planning lines with Line Type as “Billable” or “Both Budget & Billable”.

On the next requisition only those Billable/Both Budget & Billable lines will be available on the Get Job Planning Lines page which were not included on the Progress Bill.

Progress Billings – Get Job Planning Lines

Job Planning Lines - J00020 Building Construction 110 31-11 Clearing and Grubbing | 🔍 + New 🛠 Edit List ...

<input type="radio"/> Line Job Description	Job Task No. ↑	Line Type ▼	Planning Date	Contract Forecast Date	Planned Delivery Date	Document No.	Type	No.	Description	Cost Category	Progress Billing Method	Quantity
<input checked="" type="radio"/> Building Construction 110	31:10	Billable	12/31/2021	12/31/2021	12/31/2021	DC11	G/L Account	50200	Cost of Materials		%	1
→ <input checked="" type="radio"/> Building Construction 110	31:11	Billable	12/31/2021	12/31/2021	12/31/2021	DC22	G/L Account	50200	Cost of Materials		%	1
<input type="radio"/> Building Construction 110	31-20	Billable	12/31/2021	12/31/2021	12/31/2021		G/L Account	50200	Cost of Materials		%	1
<input type="radio"/> Building Construction 110	31-22	Billable	12/31/2021	12/31/2021	12/31/2021		G/L Account	50200	Cost of Materials		%	1

OK Cancel

Select the line which you want to add on Progress Billing lines, then select OK.

Progress Billing | 📄 📄 + 🗑 | ✓ Saved 📄 📄

J00020 · 2 · 0

Home Reports | More options

General >

Progress Billing Subform | Manage Line | 📄 📄

🛠 New Line 🗑 Delete Line | 🔄

Item No.	Job No.	Revenue Cat. Description	Job Task No.	Segment Code	Description	Billing Method	Base Amount	Quantity	Unit of Measure Code	Total	Work Previous Billings
1	J00020		03		Lag Screw Driver-Adaptor	%	6.25	20.00	EA	1.25	1.25
2	J00020		03-01		3"x4" aluminum front elbow	%	2.06	30.00	EA	0.62	0.62
→ 3	J00020		31-10		Cost of Materials	%	80,000.00	0.00		0.00	144,000.00
4	J00020		31-11		Cost of Materials	%	55,000.00	0.00		0.00	63,000.00

The further process is the same as the normal progress billing you follow.