

# Project Invoice

## Module Guide: Project Invoice

### Module Location

Project > Project Invoice

### Module Objective

The **Project Invoice** module is used to create a billing document or invoice for a customer based on the progress or stages of a project that have been completed. This module is the bridge between the completion of project work and the accounts receivable billing cycle.

## 1. Main View (Project Invoice List)

The main page of this module displays a list of all project invoices that have been created.

### View Explanation

- **View:** This page is a history of all project invoices. You can see the **Invoice No.**, the related **Sales Order Number**, the **Customer Name**, and the payment **Status**.
- **Action Buttons:**
  - **[New]** or **[New Direct]:** The primary button to create a new project invoice.

## 2. Steps to Create a Project Invoice

## Step 1: Create a New Invoice

From the Main View, click the **[New]** or **[New Direct]** button to open the **Add Project Invoice** form.

## Step 2: Select the Project Sales Order

On the form that appears, the first and most important step is to select the **Project Sales Order Number** to be billed. After you select the Project SO, the system will automatically load the customer details and the project stages contained within that SO.

## Step 3: Select the Stage to be Billed

In the table at the bottom, a list of project stages will appear. Select the stage (milestone) that is complete and that you will be billing the customer for at this time.

## Step 4: Fill in Invoice Details

Fill in other necessary information, such as the **Invoice Date** and the **Due Date**.

## Step 5: Confirm the Invoice

After all details are filled in and the stage to be billed has been selected, click the **Confirm** button. This action will officially create the invoice document and record a receivable in the accounting system.

## Tips & Important Notes

- This module ensures that billing to the customer aligns with the progress and contract value that was agreed upon in the **Project Sales Order**.

- An invoice created here will appear in the accounts receivable reports and will be settled via the payment receipt modules in Finance.
  - This is an important module for **Project Administration and the Finance Department (AR)**.
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