New Projects Functionality

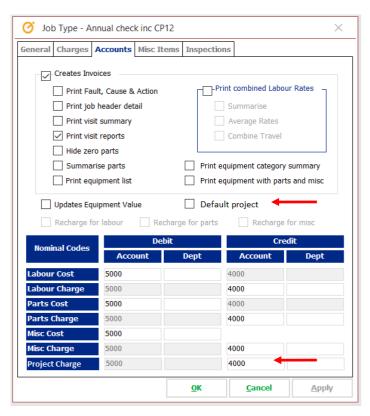## System Requirements Overview

As a user, I need to be able to create multiple visits for a job and charge/invoice by a visit (or visits) that have been completed even if the job is not complete.

As a user, I need to be able to charge/invoice an amount - status of Job (completed/not completed) but only for completed visits.

As a user, I want to be able to see on the Summary tab of the job, all payments that have been invoiced so far so I can see all charges as well as costs.

As a user, I want to be able to invoice part of a total charge to a customer. I want to be able to charge the outstanding balance and I want the system to show how much has been invoiced and what is left outstanding so we can invoice the balance. To be clear, we need to be able to do staged invoices based on both the calculated charges, and on quoted charges. i.e. we would need some way to enter visit or stage-level quoted amounts, not just the total quoted amounts.

As a System Admin, I want to be able to choose who I give access to for the invoice process for part payments.

At Job Type level you can now specify a revenue nominal code specifically for project revenue.

A new check box has been added to the main job form to allow users to indicate that this is a project job, or that they will need to invoice it more than once. This checkbox will only appear for jobs using a Job Type flagged as a Project type.

This will also replace the current Invoicing Tab with a new Projects Tab.

Job - 17439

Equipment	Site	Customer	Job
Multiple Equipment	SSE00101 ··· 🔍	SSE001 ··· 🔍	Contact Name: Francie McKenna ∨ 🔍 +
	Bessy Bell 1 Wind Farm	SSE Renewables	Contact Phone: 📞
	Cashty Road		Contact Mobile: 📞
	Newtownstewart		Contact Email: francis.mckenna@sserer ✉
	Omagh		Order No:
	Co.Tyrone		
Single Equipment	BT78 5RN		

No: 17439 Charge
Type: Routine inspection ∨
Priority: Low ∨
Status: Waiting Acceptance

Main | Equipment | Labour | Parts | Misc | Attributes | **Projects** | Summary
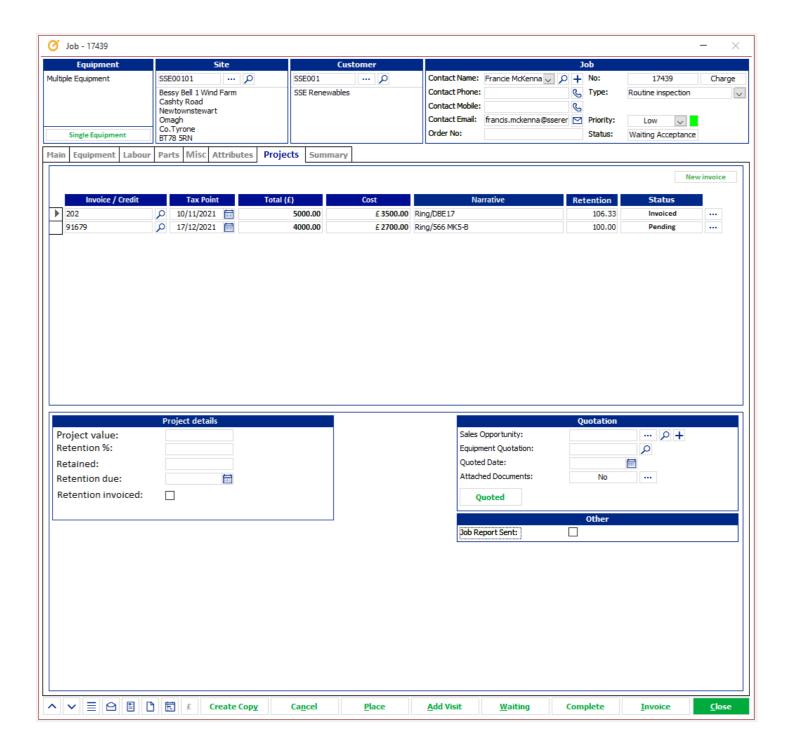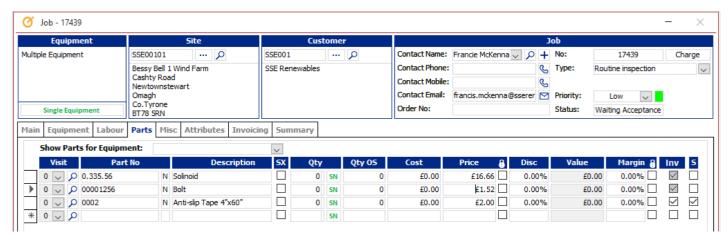
New invoice

	Invoice / Credit	Tax Point	Total (£)	Cost	Narrative	Retention	Status	
▶	202 🔍	10/11/2021 📅	5000.00	£ 3500.00	Ring/DBE17	106.33	Invoiced	···
	91679 🔍	17/12/2021 📅	4000.00	£ 2700.00	Ring/566 MK5-B	100.00	Pending	···

Project details

Project value:
Retention %:
Retained:
Retention due: 📅
Retention invoiced: ☐

Quotation

Sales Opportunity: ··· 🔍 +
Equipment Quotation: 🔍
Quoted Date: 📅
Attached Documents: No ···

Quoted

Other

Job Report Sent: ☐

∧ ∨ ≣ ✉ ▤ ▯ ▤ £ | Create Copy | Cancel | Place | Add Visit | Waiting | Complete | Invoice | **Close**

Invoice checkboxes will also be introduced on Labour, Parts & Misc Tabs to allow control over which items are to be included in the next invoice, and give visibility into which have already been invoiced

Job - 17439

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Status: Waiting Acceptance

Main | Equipment | Labour | **Parts** | Misc | Attributes | Invoicing | Summary

Show Parts for Equipment: ∨

	Visit	Part No		Description	SX	Qty	Qty OS	Cost	Price 🔒	Disc	Value	Margin 🔒	Inv	S
	0 ∨ 🔍	0.335.56	N	Solinoid	☐	0	SN 0	£0.00	£16.66 ☐	0.00%	£0.00	0.00% ☐	☑	☐
▶	0 ∨ 🔍	00001256	N	Bolt	☐	0	SN 0	£0.00	£1.52 ☐	0.00%	£0.00	0.00% ☐	☑	☐
	0 ∨ 🔍	0002	N	Anti-slip Tape 4"x60"	☐	0	SN 0	£0.00	£2.00 ☐	0.00%	£0.00	0.00% ☐	☑	☑
✳	0 ∨ 🔍				☐		SN		☐			☐	☐	☐

When the user wants to raise the next invoice against this project job, clicking the 'invoice' button will cause a new screen appears where header text can be specified and the usercan confirm values to be invoiced and costs to be apportioned accordingly.

Invoice Details ✕

Invoice Details

Tax Point 11/07/2022 📅

Header detail

	Charge	Cost		
Labour:		0.00	Retention:	5.00%
Parts:		100.00	Margin:	86.7%
Misc:		565.00	Profit:	100.00
Retention:		250.00		
Project:	5000.00			

Preview **Cancel** **Delete** **Save** **Generate**