

# BillQuick Invoice Book

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# INTRODUCTION

*Welcome to the **BillQuick® Invoice Book** from **BQE Software!***

An invoice is a marketing document that nurtures client relationships. It must communicate positive images to both new and long-term clients: Quality, Capability, Professionalism, and Confidence. BillQuick comes with around 180 standard invoice formats, all designed with Crystal Reports, the de facto standard report writer software.

BillQuick enables you to customize the invoice format on a project basis. You can customize the invoice number and format, and set invoice display attributes per project. For example, if you want to show the account summary on some project invoices and hide it on others, you can do so by checking those rules on the Project-Detail screen. You can also set these attributes for all projects from the Global Settings > Billing screen. Invoice templates are set for each contract type at the global level in the Global Settings > Templates screen but can be customized at the project level in the Project > Billing screen and at the invoice level in the Invoice Review screen. You have the option to print memos on the invoices, along with the bullets.

Invoices are created in either Manual Invoice or Billing Review. After the billing decisions are made and invoices generated, Invoice Review provides an efficient environment to preview, print and email invoices. Any past or current invoice, paid or not, draft or final is accessible in Invoice Review. The invoice list can be filtered using a dozen criteria generating just the subset with which you want to work. You can act on one or multiple invoices at a time. In addition to invoices, statements can be printed from this screen. You have an active spell check in the Invoice Review screen.

This BillQuick Invoice Book contains a list of all invoices found in BillQuick and many sample invoices for preview. Individual invoice pages break down information into:

- Description
- How to Run the Invoice



Please send any comments or suggestions about the Invoice Book, BillQuick and other products and services to [BillQuick-Ideas@bqe.com](mailto:BillQuick-Ideas@bqe.com). For other information, contact us at 310-602-4010 or [sales@bqe.com](mailto:sales@bqe.com).

# BILLQUICK INVOICES

## Hourly Invoices

### Hourly Invoice

#### Hendricks Consulting LLC

2601 Airport Drive, Suite 380  
Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

#### Invoice

Invoice Date: Apr 20, 2016  
Invoice Num: 1197  
Billing Through: Feb 4, 2019

Tracy Hunter  
County Municipal Offices  
78 Reflection Drive  
Serene, CA 98700

#### Municipal Offices Technical Support (10 Municipal Offices - 3:) - Managed by (JA)

Drawing sent through USPS same day service for final plotting to meet building department deadline.

#### Professional Services

Date	Employee	Description	Hours	Rate	Amount
4/15/2016	Geo Engineering	Accounting	1.00	\$75.25	\$75.25

Total Service Amount | \$75.25

Amount Due This Invoice: | \$75.25

*This invoice is due upon receipt*

Meeting scheduled with the building department to finalize the outhouse design

#### Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$ 11,734.75	\$ 2,852.85	1151	7/26/2016	\$ 400.00	\$ 17.50	\$ 14,442.35

Total Amount Due Including This Invoice: | \$14,517.60

Thank you for your business!

### Description

Being an hourly invoice, this format displays the professional services and reimbursable expenses charged to the client for work done on hourly projects along with an account summary. Organized by project and project manager, it provides the details about the work done by employees. The hourly invoice gives you

complete information about the date of time and expense entries, number of hours worked, employees who worked on the projects, the rate and amount for each entry. The account summary shows the services and expenses billed till date, last invoice number, date, amount, pay amount, and previous unpaid amount.

### **How to Run the Invoice**

You can run an invoice from the Invoice Review screen. To change the current invoice template to Hourly Invoices, open the Invoice Selection screen and select Hourly Invoices, Hourly Invoice.rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

Hourly Invoice (by Activity) without Rate Unit



**Hendricks Consulting LLC**

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Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

**Invoice**

Invoice Date: Jan 22, 2016  
Invoice Num: 1205  
Billing Through: Jan 22, 2016

Ms. Carolyn Sumner  
City Services Dept.  
123 Main Street  
First Floor  
YourTown, CA 90500

**PV Country Club (09-PV Country Club) - Managed by (JA)**

Professional Services

<u>Activity ID</u>	<u>Description</u>	<u>Amount</u>
Calcs:	DESIGN CALCULATIONS	\$1,125.00
<b>Total Service Amount:</b>		<b>\$1,125.00</b>

Reimbursable Expenses:

<u>Date</u>	<u>Employee</u>	<u>Description</u>	<u>Amount</u>
1/1/2015	CJ	MILEAGE	\$13.75
1/6/2015	AM	MILEAGE	\$13.75
1/7/2015	BW	COPY SERVICES	\$9.90
2/5/2015	AM	MILEAGE	\$13.75
2/14/2015	BD	MILEAGE	\$13.75
2/15/2015	CJ	MILEAGE	\$13.75
3/16/2015	BD	MILEAGE	\$13.75
3/22/2015	AM	MILEAGE	\$13.75
4/15/2015	BW	MILEAGE	\$13.75
4/30/2015	BD	MILEAGE	\$13.75
5/15/2015	BW	MILEAGE	\$13.75
6/29/2015	BW	MILEAGE	\$13.75
<b>Total Expenses:</b>			<b>\$161.15</b>
<b>Amount Due This Invoice:</b>			<b>\$1,286.15</b>

*This invoice is due upon receipt*

**Account Summary**

<u>Services BTD</u>	<u>Expenses BTD</u>	<u>Last Inv Num</u>	<u>Last Inv Date</u>	<u>Last Inv Amt</u>	<u>Last Pay Amt</u>	<u>Prev Unpaid Amt</u>
\$ 34,243.75	\$ 6,258.80	1150	7/27/2015	\$ 640.00	\$ 2,719.92	\$ 17.35

**Total Amount Due Including This Invoice: \$1,303.50**

Thank you for your business!

## Description

Not every client needs or wants to see activity detail. They want to know what activities were done and how much is owed. With this standard BillQuick invoice template, you can receive summary for each type of service and a detailed list of expenses. Organized by project, this hourly invoice displays service and expense details such as the activity ID, employee, description, bill amount, and main taxes without providing the rate and unit details. In addition, expense entries are grouped together based on the expense type.

## How to Run the Invoice

You can run this invoice from the Invoice Review screen. To change the current invoice template to Hourly Invoices, open the Invoice Selection screen and select Hourly Invoices, Hourly Invoice (by activity) without rate unit.rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

Hourly Invoice (with TE Memo) without Rate Hours

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admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

**Invoice**

**Invoice Date:** Jul 26, 2016  
**Invoice Num:** 1151  
**Billing Through:** Feb 4, 2019

Tracy Hunter  
County Municipal Offices  
78 Reflection Drive  
Serene, CA 98700

**Municipal Offices Technical Support (10 Municipal Offices - 3) - Managed by (JA)**

Professional Services

<u>Date</u>	<u>Employee</u>	<u>Description</u>	<u>Amount</u>
5/18/2016	WB	Client Conference/Meeting Fuel charges are attached.	\$100.00
6/17/2016	WB	Client Conference/Meeting	\$100.00
6/17/2016	WB	Client Conference/Meeting	\$100.00
7/17/2016	WB	Client Conference/Meeting	\$100.00

**Total Service Amount** | \$400.00

**Amount Due This Invoice:** | \$400.00

*This invoice is due upon receipt*

**Account Summary**

<u>Services BTD</u>	<u>Expenses BTD</u>	<u>Last Inv Num</u>	<u>Last Inv Date</u>	<u>Last Inv Amt</u>	<u>Last Pay Amt</u>	<u>Prev Unpaid Amt</u>
\$ 11,659.50	\$ 2,852.85	1116	4/4/2016	\$ 1,170.00	\$ 17.50	\$ 14,042.35

**Total Amount Due Including This Invoice:** | \$14,442.35

Thank you for your business!

**Description**

In this invoice format, both time and expense details are listed. Organized by the project, this format presents the professional services and reimbursable expenses charged to the client without showing their rates and units. It displays the entry date, employee, description, and amount. At the bottom on the invoice, a summary of accounts is shown.

## How to Run the Invoice

You can run this invoice from the Invoice Review screen. To change the current invoice template to Hourly Invoices, open the Invoice Selection screen and select Hourly Invoices, Hourly Invoice (with te memo) without rate hours.rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

**Hourly Invoice (with te memo) without Rate Hours**

This invoice template provides client with billing information along with time entry memos. Organized by project, the invoice displays the date, employee, description, tax, total service and expense amount along with an account summary.

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www.hendricks\_consulting.com

**Invoice**

**Invoice Date:** Jul 26, 2016  
**Invoice Num:** 1151  
**Billing Through:** Feb 4, 2019

Tracy Hunter  
County Municipal Offices  
78 Reflection Drive  
Serene, CA 98700

**Municipal Offices Technical Support (10 Municipal Offices - 3:) - Managed by (JA)**

Professional Services

<u>Date</u>	<u>Employee</u>	<u>Description</u>	<u>Amount</u>
5/18/2016	WB	Client Conference/Meeting Fuel charges are attached.	\$100.00
6/17/2016	WB	Client Conference/Meeting	\$100.00
6/17/2016	WB	Client Conference/Meeting	\$100.00
7/17/2016	WB	Client Conference/Meeting	\$100.00

**Total Service Amount** | \$400.00  
**Amount Due This Invoice:** | \$400.00

*This invoice is due upon receipt*

**Account Summary**

<u>Services BTD</u>	<u>Expenses BTD</u>	<u>Last Inv Num</u>	<u>Last Inv Date</u>	<u>Last Inv Amt</u>	<u>Last Pay Amt</u>	<u>Prev Unpaid Amt</u>
\$ 11,659.50	\$ 2,852.85	1116	4/4/2016	\$ 1,170.00	\$ 17.50	\$ 14,042.35

**Total Amount Due Including This Invoice:** | \$14,442.35

Thank you for your business!

Hourly Invoice (by activity)

This invoice provides client with billing information based on the activities done on a project. Organized by project, this hourly invoice displays the activity, description, hours worked and bill amount.



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www.hendricks\_consulting.com

**Invoice**

Invoice Date: Jan 22, 2016  
Invoice Num: 1205  
Billing Through: Jan 22, 2016

Ms. Carolyn Sumner  
City Services Dept.  
123 Main Street  
First Floor  
Your Town, CA 90500

**PV Country Club (09-PV Country Club) - Managed by (JA)**

Professional Services

<u>Activity ID</u>	<u>Description</u>	<u>Hours</u>	<u>Amount</u>
Calcs:	DESIGN CALCULATIONS	5.00	\$1,125.00
<b>Total Service Amount:</b>			<b>\$1,125.00</b>

Reimbursable Expenses:

<u>Date</u>	<u>Employee</u>	<u>Description</u>	<u>Amount</u>
1/1/2015	CJ	MILEAGE	\$13.75
1/6/2015	AM	MILEAGE	\$13.75
1/7/2015	BW	COPY SERVICES	\$9.90
2/5/2015	AM	MILEAGE	\$13.75
2/14/2015	BD	MILEAGE	\$13.75
2/15/2015	CJ	MILEAGE	\$13.75
3/16/2015	BD	MILEAGE	\$13.75
3/22/2015	AM	MILEAGE	\$13.75
4/15/2015	BW	MILEAGE	\$13.75
4/30/2015	BD	MILEAGE	\$13.75
5/15/2015	BW	MILEAGE	\$13.75
6/29/2015	BW	MILEAGE	\$13.75
<b>Total Expenses:</b>			<b>\$161.15</b>
<b>Amount Due This Invoice:</b>			<b>\$1,286.15</b>

*This invoice is due upon receipt*

**Account Summary**

<u>Services BTD</u>	<u>Expenses BTD</u>	<u>Last Inv Num</u>	<u>Last Inv Date</u>	<u>Last Inv Amt</u>	<u>Last Pay Amt</u>	<u>Prev Unpaid Amt</u>
\$ 34,243.75	\$ 6,258.80	1150	7/27/2015	\$ 640.00	\$ 2,719.92	\$ 17.35

**Total Amount Due Including This Invoice: \$1,303.50**

Thank you for your business!

Recurring Plus Hourly Invoice



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www.hendricks\_consulting.com

**Invoice**

Invoice Date: Jan 22, 2016  
Invoice Num: 1205  
Billing Through: Jan 22, 2016

Ms. Carolyn Summer  
City Services Dept.  
123 Main Street  
First Floor  
Your Town, CA 90500

**PV Country Club (09-PV Country Club:) - Managed by (JA)**

Professional Services

Date	Employee	Description	Hours	Rate	Amount
4/6/2015	Geo Engineering	DESIGN CALCULATIONS	5.00	\$225.00	\$1,125.00
<b>Total Service Amount:</b>					<b>\$1,125.00</b>

Reimbursable Expenses:

Date	Employee	Description	Amount
1/1/2015	CJ	MILEAGE	\$13.75
1/6/2015	AM	MILEAGE	\$13.75
1/7/2015	BW	COPY SERVICES	\$9.90
2/5/2015	AM	MILEAGE	\$13.75
2/14/2015	BD	MILEAGE	\$13.75
2/15/2015	CJ	MILEAGE	\$13.75
3/16/2015	BD	MILEAGE	\$13.75
3/22/2015	AM	MILEAGE	\$13.75
4/15/2015	BW	MILEAGE	\$13.75
4/30/2015	BD	MILEAGE	\$13.75
5/15/2015	BW	MILEAGE	\$13.75
6/29/2015	BW	MILEAGE	\$13.75
<b>Total Expenses:</b>			<b>\$161.15</b>
<b>Amount Due This Invoice:</b>			<b>\$1,286.15</b>

*This invoice is due upon receipt*

**Account Summary**

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$ 34,243.75	\$ 6,258.80	1150	7/27/2015	\$ 640.00	\$ 2,719.92	\$ 17.35

**Total Amount Due Including This Invoice: \$1,303.50**

Thank you for your business!

**Description**

Displays the professional services and reimbursable expenses charged to the client for work done on recurring + hourly projects. Organized by project and project manager, it shows the recurring fixed fee besides the details about the work done by employees. The invoice gives you complete information about

the date of time and expense entries, number of hours worked, employees who worked on the projects, the rate and amount for each entry.

## More Hourly Invoices

- *Hourly Balance Forward Invoice:* Provides client with information regarding amount due on the previous invoice. Organized by project, the invoice displays the balance brought forward and accounts summary. It also displays other information including date, number of hours worked, rate and bill amount.
- *Hourly Invoice (with\_ Start\_Stop\_Time):* Provides client with billing details including start and stop time of the billed activity. Organized by project manager, the invoice displays the date, number of hours worked, rate and bill amount along with an account summary.
- *Hourly Invoice by Activity Description - Cover Sheet:* Provides client with billing information for professional services and expenses based on the activity and expense description. The invoice displays a cover page with an invoice and account summary, followed by the invoice details grouped by item description. It also displays a contract summary.
- *Hourly Invoice by Classification - Cover Sheet:* Provides client with billing information for professional services and expenses based on the job classification or title of employee. The invoice displays a cover page with an invoice and account summary, followed by the invoice details grouped by classification.
- *Hourly Invoice by Employee - Cover Sheet:* Provides client with billing information for professional services and expenses by employees. The invoice displays a cover page with an invoice and account summary, followed by the invoice details grouped by employee.
- *Hourly Invoice with Billing History:* Provides client with information about the previous itemized invoices with a complete billing history. Organized by project manager, the invoice displays the hours worked, rate, and bill amount, along with service and expense totals.
- *Hourly Invoice Xtra Time:* Provides client with information about the extra time or additional services incurred on a project. Organized by project manager, the invoice displays the date, hours, rate and bill amount, along with the service and expense totals. It also displays an account summary.
- *Hourly Invoice (Attorney):* Provides billing details in a format commonly used by attorneys. It displays detailed information about the client along with the date, number of hours worked, rate and bill amount. It also displays the previous balance and balance due.
- *Hourly Invoice (by activity desc-emp title):* Provides client with billing details along with the activity description and employee title. The activity description is retrieved from the Activity Codes screen, if available, before defaulting to the one in the time entry screens. Organized by project manager,

the invoice displays hours, rate and bill amount besides an account summary.

- *Hourly Invoice (by activity) without rate unit amount:* Provides client with billing details based on the activities or services rendered on a project. Organized by project, the invoice displays the total services along with an account summary.
- *Hourly Invoice (by classification) without rate unit amount:* Provides client with billing information based on the job classification or title of employees. Organized by project manager, the invoice displays the date, employee, services and expenses along with an account summary.
- *Hourly Invoice (by classification) without rate unit:* Provides client with billing information based on the job classification or title of employees. Organized by project manager, the invoice shows the date, employee, and bill amount along with the service and expense totals. It also displays an account summary.
- *Hourly Invoice (by classification):* Provides client with billing information based on the job classification or title of employee. Organized by project manager, the invoice displays the hours worked, rate, bill amount, employee, and date, along with total services and expenses. It also displays an account summary.
- *Hourly Invoice (by classification) (Contract Sum):* Provides client with billing information based on the job classification or title of employee. Organized by project, the invoice displays the amount billed, hours worked, bill rate, bill amount, employee, and so on along with total services and reimbursable expenses. It also displays an account summary.
- *Hourly Invoice (by desc-emp title) without rate unit amount:* Provides client with billing information based on the activity description and job title of employee. Organized by project, the invoice displays the activity details, employee title, total service amount and an account summary.
- *Hourly Invoice (by desc-emp title) without rate unit:* Provides client with billing information based on the activity description and job title of employee. Organized by project, the invoice displays the activity description, employee title, total service amount, hours worked and amount charged against the activity. It also displays an account summary.
- *Hourly Invoice (by desc-emp title):* Provides client with billing information along with the activity description and job title of employee. The activity description is retrieved from the time entry screens. Organized by project, the invoice displays the activity description, employee title, total service amount, hours worked, rate charged and bill amount. It also displays an account summary.
- *Hourly Invoice (by description) without rate unit amount:* Provides client with billing information based on the activity description. The invoice displays the activity description, total service amount and an account summary.
- *Hourly Invoice (by description) without rate unit:* Provides client with billing information based on

the activity description. The invoice displays the activity description, total service amount, hours worked, amount charged and an account summary.

- *Hourly Invoice (by description):* Provides client with billing information based on the activity description. The invoice displays the hours worked, rate, bill amount, and an account summary. It also displays a contract summary.
- *Hourly Invoice (by emp title) without rate unit amount:* Provides client with billing information based on the job title of employee. Organized by project, the invoice displays the date, activity description, total service and expense amount, along with an account summary.
- *Hourly Invoice (by emp title) without rate unit:* Provides client with billing information based on the job title of employee. Organized by project manager, the invoice displays details such as employee, description, bill amount, total expense and service amount along with an account summary.
- *Hourly Invoice (by emp title) (Contract Sum):* Provides client with billing information based on the job title of employee and contract amount. Organized by project manager, the invoice displays the date, employee, hours worked, rate, bill amount, and non-billable amount. The invoice also displays the service and expense totals along with an account summary.
- *Hourly Invoice (by emp title):* Provides client with billing information based on the job title of employee. Organized by project manager, the invoice displays the date, employee, hours worked, rate and bill amount. The invoice also displays the total services and expenses along with an account summary.
- *Hourly Invoice (by employee) without rate unit amount:* Provides client with billing information based on the employee. Organized by project, the invoice displays the total service and expense amount, employee, activity description and an account summary.
- *Hourly Invoice (by employee) without rate unit:* Provides client with billing information based on the employee. Organized by project, the invoice displays the employee, activity description, bill amount, service and expense totals along with an account summary.
- *Hourly Invoice (by employee):* Provides client with billing information based on the employee. The invoice displays the employee, activity description, hours worked, rate, bill amount, total services and expenses, along with an account summary.
- *Hourly Invoice (by emp-weekly) without rate unit amount:* Provides a weekly time card summary of employees based on the job title. The invoice displays the employee title, date, total service and expense amount, and an account summary.
- *Hourly Invoice (by emp-weekly) without rate unit:* Provides a weekly time card summary of employees based on the job title. The invoice displays the employee title, date, bill amount, total service and expense amount, and an account summary.

- *Hourly Invoice (by emp-weekly)*: Provides a weekly time card summary of employees based on the job title. The invoice displays the employee title, date, hours worked, rate, bill amount, total service and expense amount, and an account summary.
- *Hourly Invoice (by product)*: Provides client with billing information for professional services rendered and reimbursable expenses charged for work done. Organized by project, the invoice displays the service details such as date, employee, activity description, and hours worked. It also lists the reimbursable expenses and products sold separately along with an account summary.
- *Hourly Invoice (Grouped by Activity Expense) without rate unit*: Provides client with billing information grouped by activity or expense code. Organized by project, the invoice displays the activity, expense, description, hours or units, total services and expenses along with an account summary.
- *Hourly Invoice (grouped by emp per week)*: Provides client with weekly billing information grouped by employee title. Organized by project, the invoice displays the employee, date, total hours, rate, bill amount, and total service and expense amount.
- *Hourly Invoice (with Exp CR and Units)*: Displays the hourly billing information. Organized by project, the invoice displays the date, employee, activity description, hours worked, bill rate, cost rate, expense units and bill amount along with the service and expense totals.

$$\text{Cost Amount} = \text{Actual Hours} \times \text{Cost Rate.}$$

- *Hourly Invoice (with te memo) (with retainer history)*: Provides client with billing information along with retainer history and time entry memos. Organized by project, the invoice displays the date, employee, hours worked, rate, bill amount, retainer applied along with total service and expense amount.
- *Hourly Invoice (with te memo)*: Provides client with billing information along with time entry memos. Organized by project, the invoice displays the date, employee, description, hours worked, rate, bill amount, total service and expense amount along with an account summary.
- *Hourly Invoice (without rate and units)*: Provides client with billing information grouped by professional services and reimbursable expenses. Organized by project, the invoice displays the date, description, tax, bill amount and total service and expense amount.
- *Hourly Invoice (without rate unit amounts)*: Provides client with billing information grouped by professional services and reimbursable expenses. Organized by project, the invoice displays the date, description, tax, and total service and expense amount.
- *Hourly Void Invoice*: Displays a list of invoices that are void. The invoice includes details such as date, number of hours worked, bill amount along with total services and expenses.

## Fixed Invoices

### Fixed Invoice



#### Hendricks Consulting LLC

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Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

### Invoice

Tracy Hunter  
County Municipal Offices  
78 Reflection Drive  
Serene, CA 98700

Invoice Date: Jan 23, 2016  
Invoice Num: 1223  
Billing Through: Jan 22, 2016

#### Municipal Offices Feasibility (10-Municipal Offices) - Managed by (JA)

Contract Type: Fixed  
Contract Amount: \$ 2,200.00  
Retainer Required: \$ 500.00

Amount:

#### Reimbursable Expenses:

Date	Employee	Description	Amount
5/10/2015	RC	MILEAGE	\$37.50
6/9/2015	RT	MILEAGE	\$37.50
6/9/2015	SB	MILEAGE	\$37.50
6/9/2015	SL	MILEAGE	\$37.50

Total Expenses:

Amount Due This Invoice:

*This invoice is due upon receipt*

#### Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$ 1,922.50	\$ 335.99	1192	8/19/2015	\$ 75.00	\$ 105.00	\$ 75.00

Total Amount Due Including This Invoice:

Thank you for your business!

## Description

This fixed invoice is based on the fixed price or contract amount agreed by the client and your company. These invoices can be billed in full, by the hour or in incremental flat amounts. This format displays the billing details for work done on fixed projects along with an account summary. Organized by project manager, the invoice gives a summary of the total invoiced amount. It also includes information such as the project name, its contract type and amount along with the retainer amount charged to the client, if any.

## How to Run the Invoice

You can run this invoice from the Invoice Review screen. To change the current invoice template to Fixed Invoices, open the Invoice Selection screen and select Fixed Invoices, Fixed Invoice.rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

Fixed Invoice with Extra Hours



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www.hendricks\_consulting.com

**Invoice**

Tracy Hunter  
County Municipal Offices  
78 Reflection Drive  
Serene, CA 98700

**Invoice Date:** Jan 23, 2016  
**Invoice Num:** 1224  
**Billing Through:** Jan 22, 2016

**Municipal Offices Development (10-Municipal Offices-2) - Managed by (JA)**

**Contract Type:** Fixed  
**Contract Amount:** \$ 65,000.00  
**Retainer Required:** \$ 5,000.00

Amount :

Reimbursable Expenses:

<u>Date</u>	<u>Employee</u>	<u>Description</u>	<u>Amount</u>
4/3/2015	IMK	COURIER	\$27.50
4/4/2015	IMK	MILEAGE	\$38.00
4/13/2015	IMK	PLANS/DRAWINGS/SKETCHES	\$62.43
6/5/2015	RC	PLANS/DRAWINGS/SKETCHES	\$15.00
6/6/2015	RC	MILEAGE	\$28.50
6/7/2015	RC	COURIER	\$30.00
6/8/2015	RC	MILEAGE	\$16.00
6/13/2015	RC	COURIER	\$27.50
6/14/2015	RC	MILEAGE	\$38.00
6/23/2015	RC	PLANS/DRAWINGS/SKETCHES	\$62.43
7/5/2015	RT	PLANS/DRAWINGS/SKETCHES	\$15.00
7/5/2015	SB	PLANS/DRAWINGS/SKETCHES	\$15.00
7/5/2015	SL	PLANS/DRAWINGS/SKETCHES	\$15.00
7/6/2015	RT	MILEAGE	\$28.50
7/6/2015	SB	MILEAGE	\$28.50
7/6/2015	SL	MILEAGE	\$28.50
7/7/2015	RT	COURIER	\$30.00
7/7/2015	SB	COURIER	\$30.00
7/7/2015	SL	COURIER	\$30.00
7/8/2015	RT	MILEAGE	\$16.00
7/8/2015	SB	MILEAGE	\$16.00
7/8/2015	SL	MILEAGE	\$16.00
7/13/2015	RT	COURIER	\$27.50
7/13/2015	SB	COURIER	\$27.50
7/13/2015	SL	COURIER	\$27.50
7/14/2015	RT	MILEAGE	\$38.00
7/14/2015	SB	MILEAGE	\$38.00
7/14/2015	SL	MILEAGE	\$38.00

**Total Expenses:**

**Amount Due This Invoice:**

*This invoice is due upon receipt*

## Description

This invoice provides clients with information regarding the service rendered and hours exceeding the standard hours along with the total amount charged. Organized by the project, the invoice displays the contract type, contract amount, percent complete, reimbursable expenses. Besides, at the bottom on the invoice a brief summary of the account is shown.

## How to Run the Invoice

You can run this invoice from the Invoice Review screen. To change the current invoice template to Fixed Invoices, open the Invoice Selection screen and select Fixed Invoices, Fixed Invoice with Extra Hours.rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

## More Fixed Invoices

- *Fixed Invoice (Accountants) Custom Billing Period:* Provides client with billing information based on a custom billing period. The invoice displays a summary of new charges, outstanding balance and new balance for the services rendered.
- *Fixed Invoice (Accountants):* Provides client with billing information for services rendered. Organized by project, the invoice displays new charges, outstanding balance, and new balance.
- *Fixed Invoice with Time Details:* Displays all the time details of a project worked on including number of hours worked, rate and bill amount. Organized by project, the invoice displays the contract details, retainer required along with an account summary.
- *Fixed Invoice (% Complete):* Percent complete invoice uses the Percent Complete value of a project to calculate the net bill amount. Organized by project, the invoice displays the services and reimbursable expenses charged to the client for work done on fixed projects. It also displays an account summary.
- *Fixed Invoice (by Classification):* Organized by project, this fixed invoice type displays the contract type, contract amount, and retainer required for the project. It also displays the employee job classification, hours worked, rate, bill amount, total services and expenses along with an account summary.
- *Fixed Invoice (Contract Sum):* Organized by project, this invoice provides client with contract details. It displays the contract amount, amount billed and amount remaining from it. The billing information includes the amount due and an account summary.
- *Fixed Invoice (expense memo):* Provides client with details about reimbursable expenses along with their memos. Organized by project, the invoice displays the contract amount, contract type, retainer required and an account summary.

- *Fixed Invoices (with billed to date):* Provides client with billing information including reimbursable expenses and billed-to-date values. Organized by project, the invoice displays contract details, retainer required, date, employee, charge amount along with an account summary.
- *Fixed Invoice (with Expense CR and Units):* Provides client with billing information including reimbursable expenses with cost and other details. Organized by project, the invoice displays the contract details, retainer required, amount due along with an account summary.
- *Fixed Phased Invoice (% Complete):* Displays billing information for fixed projects and their phases. The invoice represents joint billing details for projects with multiple phases under them. Organized by parent project, it provides information such as phase ID, name, contract amount, previously billed and due amount, reimbursable expenses and an account summary at the bottom. This phased invoice also shows the percentage of completion of each phase.
- *Fixed Void Invoice:* This is a void invoice that displays billing information of a fixed project. It includes details such as contract amount, contract type, retainer required, and amount due along with total expenses.
- *Invoice with Employee Title:* Provides client with billing information about a fixed project based on the employee title. Organized by project, the invoice displays the contract amount, contract type, retainer required, hours worked, rate, bill amount, total services and expenses along with an account summary.

## Cost Plus Invoices

Cost Plus (by Classification)

### Hendricks Consulting LLC

2601 Airport Drive, Suite 380  
Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

### Invoice

Invoice Date: Jan 23, 2016  
Invoice Num: 1205  
Billing Through: Jan 1, 2016

TO: Ms. Carolyn Summer  
City Services Dept.  
123 Main Street  
First Floor  
Your Town, CA 90500

#### PV Country Club (09-PV Country Club:) - Managed by (JA)

For professional services rendered on the above referenced project for the period ending: January 01, 2016

#### Direct Labor:

<u>Classification</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Geotechnical Engineers	5.00	\$200.00	\$1,000.00
Direct Labor Subtotal:			\$1,000.00
OverHead (12.50% Of Direct Labor Subtotal):			\$125.00
Direct Labor Total:			<u>\$1,125.00</u>

#### Direct Expenses:

<u>Description</u>	<u>Amount</u>
COPY SERVICES	\$9.90
MILEAGE	\$151.25
Total Expenses:	<u>\$161.15</u>
Amount Due This Invoice:	<u>\$1,286.15</u>

*This invoice is due upon receipt*

#### Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$ 34,243.75	\$ 6,258.80	1150	7/27/2015	\$ 640.00	\$ 2,719.92	\$ 17.35

Total Amount Due Including This Invoice: \$1,303.50

Thank you for your business!

## Description

If you are engineering, architectural, or other professional services firm that works for federal or state agencies, you may have to use Cost Plus contracts. Cost Plus billing adds a profit margin or management fee to the bill amount. BillQuick supports Cost + Percentage and Cost + Fixed Fee contracts, including their invoice templates. You can set special bill rates in the SFS or EFS for the direct costs and set the fixed fee or percentage on the Project-General screen.

Cost Plus (by Classification) invoice displays the professional services and reimbursable expenses charged to the client. Organized by project, the invoice gives complete information about direct labor and direct expenses, hours, rate and amount. It also displays the labor totals and expense totals in the account summary.

## How to Run the Invoice

You can run this invoice from the Invoice Review screen. To change the current invoice template to cost plus Invoices, open the Invoice Selection screen and select Cost Plus (by Classification).rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

Cost Plus Details

**Hendricks Consulting LLC**

2601 Airport Drive, Suite 380  
Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

**Invoice**

Invoice Date: Jan 23, 2016  
Invoice Num: 1205  
Billing Through: Jan 1, 2016

Ms. Carolyn Sumner  
City Services Dept.  
123 Main Street  
First Floor  
YourTown, CA 90500

PV Country Club (09-PV Country Club:) - Managed by (JA)

Professional Services

Date	Employee	Description	Hours	Rate	Amount
4/6/2015	Geo Engineering	DESIGN CALCULATIONS	5.00	\$200.00	\$1,000.00
<b>Direct Labor Subtotal</b>					<b>\$1,000.00</b>
Overhead (12.50% of Direct Labor Subtotal):					\$125.00
<b>Direct Labor Total</b>					<b>\$1,125.00</b>

Reimbursable Expenses:

Date	Employee	Description	Amount
1/1/2015	CJ	MILEAGE	\$13.75
1/6/2015	AM	MILEAGE	\$13.75
1/7/2015	BW	COPY SERVICES	\$9.90
2/5/2015	AM	MILEAGE	\$13.75
2/14/2015	BD	MILEAGE	\$13.75
2/15/2015	CJ	MILEAGE	\$13.75
3/16/2015	BD	MILEAGE	\$13.75
3/22/2015	AM	MILEAGE	\$13.75
4/15/2015	BW	MILEAGE	\$13.75
4/30/2015	BD	MILEAGE	\$13.75
5/15/2015	BW	MILEAGE	\$13.75
6/29/2015	BW	MILEAGE	\$13.75
<b>Total Expenses:</b>			<b>\$161.15</b>
<b>Amount Due This Invoice:</b>			<b>\$1,286.15</b>

*This invoice is due upon receipt*

**Account Summary**

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$ 34,243.75	\$ 6,258.80	1150	7/27/2015	\$ 640.00	\$ 2,719.92	\$ 17.35

**Total Amount Due Including This Invoice: \$1,303.50**

Thank you for your business!

## Description

Cost plus detailed invoice displays the professional services and reimbursable expenses charged to the client. Organized by project, the invoice displays hours, rate, and amount. The fixed fee in this invoice is calculated based on the amount or percentage, which is specified in the Fixed Fee field of the Project screen.

## How to Run the Invoice

You can run this invoice from the Invoice Review screen. To change the current invoice template to cost plus Invoices, open the Invoice Selection screen and select Cost Plus Details.rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

## More Cost Plus Invoices

- **Cost Plus Void Invoice:** This is a void invoice format. Organized by project, the invoice provides billing information such as total service amount, fixed fee charged, total expenses and amount due.
- **Cost Plus (by description):** Provides client with billing information about cost plus contracts based on the activity and expense description. Organized by project, the invoice displays direct labor and expense charges including hours worked, rate, bill amount, fixed fee, total labor and expenses along with an account summary.
- **Cost Plus (by emp title):** Provides client with billing information about cost plus contracts based on the employee title. Organized by project, the invoice displays direct labor and expense charges including hours worked, rate, bill amount, fixed fee, total labor and expenses along with an account summary.
- **Cost Plus (by employee):** Provides client with billing information about cost plus contracts based on the employee. Organized by project, the invoice displays direct labor and expense charges including hours worked, rate, bill amount, fixed fee, total labor and expenses along with an account summary.

## Joint Invoices

### Joint Invoice

#### Hendricks Consulting LLC

2601 Airport Drive, Suite 380  
Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

#### Invoice

Invoice Date: Jan 23, 2016  
Invoice Num: 1212  
Billing Through: Jan 1, 2016

Mr. Mark Summer  
Housing and Urban Development  
652 Third Avenue  
New York, NY 10001

#### Housing and Urban Development - New York City (10-HUD NY) - Managed by (JA)

##### Professional Services:

Date	Employee	Description	Hours	Rate	Amount
6/24/2015	JA	Telephone Call/Conference	2.00	\$120.00	\$240.00
6/26/2015	WB	Client Conference/Meeting	1.50	\$100.00	\$150.00
6/28/2015	WB	Report/Letter	1.50	\$100.00	\$150.00
6/28/2015	WB	Telephone Call/Conference	1.00	\$100.00	\$100.00
7/1/2015	BW	Computer Installation	6.00	\$80.00	\$480.00
7/2/2015	BW	Computer Installation	6.00	\$80.00	\$480.00
7/3/2015	WB	Telephone Call/Conference	1.00	\$100.00	\$100.00
7/3/2015	BW	Computer Installation	6.00	\$80.00	\$480.00
7/4/2015	BW	Computer Installation	6.00	\$80.00	\$480.00
7/5/2015	BW	Computer Installation	6.00	\$80.00	\$480.00
7/8/2015	CJ	Site Supervision	6.00	\$60.00	\$360.00
7/9/2015	CJ	Site Supervision	6.00	\$60.00	\$360.00
7/10/2015	CJ	Site Supervision	3.00	\$60.00	\$180.00
7/13/2015	BD	Preliminary Design	6.00	\$70.00	\$420.00
7/14/2015	BD	Preliminary Design	6.00	\$70.00	\$420.00
7/14/2015	CJ	Preliminary Design	6.00	\$60.00	\$360.00
7/15/2015	SB	Telephone Call/Conference	6.00	\$70.00	\$420.00
7/15/2015	CJ	Site Supervision	6.00	\$60.00	\$360.00
7/15/2015	CJ	Preliminary Design	5.75	\$60.00	\$345.00
7/15/2015	RT	Telephone Call/Conference	6.00	\$70.00	\$420.00
<b>Total Services:</b>					<b>\$6,785.00</b>

Project (10-HUD NY) Total Amount Due: **\$6,785.00**

#### Housing and Urban Development - Richmond, VA (10-HUD Richmond) - Managed by (JA)

##### Professional Services:

Date	Employee	Description	Hours	Rate	Amount
6/17/2015	JA	Client Conference/Meeting	1.00	\$120.00	\$120.00
6/17/2015	JA	Telephone Call/Conference	1.00	\$120.00	\$120.00
6/18/2015	SB	Preliminary Design	6.00	\$70.00	\$420.00
6/18/2015	SB	Preliminary Design	6.00	\$70.00	\$420.00
6/22/2015	BW	Telephone Call/Conference	2.00	\$80.00	\$160.00
6/22/2015	RT	Telephone Call/Conference	6.00	\$70.00	\$420.00
6/23/2015	CJ	Liason/Coordination	4.00	\$60.00	\$240.00
6/24/2015	WB	Research	0.75	\$100.00	\$75.00
6/24/2015	CJ	Telephone Call/Conference	0.75	\$60.00	\$45.00
6/24/2015	BW	Telephone Call/Conference	0.25	\$80.00	\$20.00
6/24/2015	CJ	Telephone Call/Conference	1.00	\$60.00	\$60.00
6/24/2015	WB	Telephone Call/Conference	0.50	\$100.00	\$50.00
6/25/2015	WB	Site Measurement	2.00	\$100.00	\$200.00

## Description

A joint invoice groups the billing of different projects belonging to the same client. In case of projects with phases, it groups the phases of the parent project. This format displays the professional services and reimbursable expenses charged to the client for work done along with an account summary. Organized by project, the invoice provides details about time and expense entries by employees charged to the projects. It gives you complete information about the date of entries, number of hours worked, employees who worked on the projects, the rate and amount for each entry. The account summary at the bottom shows totals for billed to date, paid to date and balance due.

## How to Run the Invoice

You can run this invoice from the Invoice Review screen. To change the current invoice template to Joint Invoices, open the Invoice Selection screen and select Joint Invoices, Joint Invoice.rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

Joint Invoice Summarized

**Hendricks Consulting LLC**

2601 Airport Drive, Suite 380  
Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

**Invoice**

**Invoice Date:** Jan 23, 2016  
**Invoice Num:** 1212  
**Billing Through:** Jan 1, 2016

Mr. Mark Summer  
Housing and Urban Development  
652 Third Avenue  
New York, NY 10001

<u>Project Name (ID)</u>	<u>Amount</u>
Housing and Urban Development - New York City (10-HUD NY) - Managed by (JA)	\$6,785.00
Housing and Urban Development - Richmond, VA (10-HUD Richmond) - Managed by (JA)	\$8,634.82

**Amount Due This Invoice:**

*This invoice is due upon receipt*

**Account Summary**

<b>Billed To Date</b>	<b>Paid To Date</b>	<b>Balance Due</b>
<b>\$ 152,162.79</b>	<b>\$ 54,735.00</b>	<b>\$ 97,427.79</b>

Thank you for your business!

**Description**

In situations where you are handling multiple projects for a common client, you may want to send a summarized single (joint) invoice for all of the client’s projects. This invoice shows details of each project and then totals the account due. Organized by the project manager, the invoice displays the project name, amount and account summary.

**How to Run the Invoice**

You can run this invoice from the Invoice Review screen. To change the current invoice template to Joint Invoices, open the Invoice Selection screen and select Joint Invoices, Joint Invoice summarized.rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

## More Joint Invoices

- *Joint Invoice (Accountants):* Provides client with billing information about the professional services rendered and reimbursable expenses charged for work done on projects. The invoice displays the services, expenses, total fee and expenses, unpaid balance and amount due. It also displays a client aging summary.
- *Joint Invoice by Classification:* Provides client with billing information about the professional services rendered and reimbursable expenses charged for work done on projects. Organized by project, the invoice displays information based on the employee classification. It includes details such as units or hours, rate, bill amount, total services and expenses, amount due along with an account summary.
- *Joint Invoice by Description:* Provides client with billing information about the professional services rendered and reimbursable expenses charged for work done on projects. Organized by project, the invoice displays information based on the activity or expense description. It includes details such as units or hours, rate, bill amount, total services and expenses, amount due along with an account summary.
- *Joint Invoice by Emp Title:* Provides client with billing information about the professional services rendered and reimbursable expenses charged for work done on projects. Organized by project, the invoice displays information based on the employee title. It includes details such as units or hours, rate, bill amount, total services and expenses, amount due along with an account summary.
- *Joint Invoice by Employee:* Provides client with billing information about the professional services rendered and reimbursable expenses charged for work done on projects. Organized by project, the invoice displays information based on the employee. It includes details such as units or hours spent, bill rate, bill amount, total services and expenses, amount due along with an account summary.
- *Joint Invoice Cost Plus (by description):* Provides client with billing information about the direct labor and expenses charged for work done on cost plus projects. Organized by project, the invoice displays information based on the activity or expense description. It includes details such as hours worked, rate, bill amount, total labor and expenses, fixed fee and amount due along with an account summary.
- *Joint Invoice Phased:* Provides client with detailed billing information about project phases. The invoice displays the contract amount, percent complete, services and expenses billed, amount due along with an account summary.
- *Joint Invoice Xtra Time:* Provides client with billing information about the extra time or additional services charged to the projects. Organized by project, this joint invoice displays details including date, employee, units or hours, rate, bill amount, total services, tax, amount due along with an

account summary.

- *Joint Invoice (by desc-classification)*: Provides client with billing information about the services rendered and reimbursable expenses charged for work done on projects. The invoice displays information based on the activity or expense description and job classification. It includes details such as hours worked, rate, bill amount, total services and expenses, amount due along with an account summary.
- *Joint Invoice (by desc-emp title)*: Provides client with billing information about the services rendered and reimbursable expenses charged for work done on projects. The invoice displays information based on the activity or expense description and employee title. It includes details such as hours worked, rate, bill amount, total services and expenses, amount due along with an account summary.
- *Joint Invoice (Contract Sum)*: Provides client with billing information about the professional services rendered and reimbursable expenses charged for work done on projects. Organized by project, the invoice displays contract details such as contract sum, amount billed and amount remaining. It also includes details such as units or hours, rate, bill amount, total services and expenses, amount due along with an account summary.
- *Joint Invoice (mixed) (% Complete)*: Provides client with billing information including reimbursable expenses charged for work done on projects. Organized by project, the invoice displays information based on the percentage of completion of a project. It includes details such as contract amount, percent complete and total expenses. The invoice also displays progress payment due for each project and an account summary.
- *Joint Invoice (mixed)*: Provides client with billing information including contract details. Organized by project, the invoice displays information such as contract amount, total services and expenses, progress payment due for each project and an account summary.
- *Joint Invoice (with Exp CR and Units)*: Provides client with billing information about the professional services rendered and reimbursable expenses charged for work done on projects. The invoice displays details such as hours or units, cost and bill rate, cost and bill amount, total services and expenses, amount due along with an account summary.
- *Joint Invoice (With Memo)*: Provides client with billing information about the professional services rendered and reimbursable expenses charged for work done on projects. The invoice displays the time and expense memos, description, date, and employee. It includes details such as units or hours, rate, bill amount, total services and expenses, amount due along with an account summary.
- *Joint Phased Invoice (percent)*: Provides detailed billing information about project phases. Organized by project, the invoice displays phase, percentage of fee or contract, contract amount, percent complete, service and expense amounts, amount due, and so on. It also displays the total

earned-to-date value along with an account summary.

- *Joint Void Invoice:* This is a void invoice format for joint projects. Organized by project, the invoice displays the total services and expenses along with the amount due.
- *Multi-Tier Joint Invoice:* Provides client with billing information about phased projects up to three levels, referred to as multi-tier. Organized by project and its phases, the invoice displays information about the professional services rendered and reimbursable expenses charged for work done. It includes details such as hours or units, rate, bill amount, amount due after discount, total services and expenses along with an account summary.

## Manual Invoices

### Manual Invoice

#### Hendricks Consulting LLC

2601 Airport Drive, Suite 380  
Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

#### Invoice

Invoice Date: Jan 23, 2016  
Invoice Num: 1215  
Billing Through: Jan 11, 2016

Ms. Carolyn Sumner  
City Services Dept.  
123 Main Street  
First Floor  
YourTown, CA 90500

PV Country Club (09-PV Country Club) - Managed by (JA)

Services:

Description	Cost	Tax %	Amount
Accounting	\$500.00		\$500.00
Design Calculations	\$1,000.00		\$1,000.00
<b>Subtotal:</b>	<b>\$1,500.00</b>		<b>\$1,500.00</b>

Amount Due This Invoice: **\$1,500.00**

*This invoice is due upon receipt*

#### Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$ 35,743.75	\$ 6,258.80	1205	1/23/2016	\$ 1,286.15	\$ 2,719.92	\$ 1,303.50

Total Amount Due Including This Invoice: **\$2,803.50**

Thank you for your business!

## Description

A manual invoice shows the billing details as generated from the Manual Invoice screen of BillQuick. The standard manual invoice includes the services as well as the expense details associated with a project, along with the Billing From-To dates. It includes the cost, tax and charge amount for each item along with any discounts or retainers applied. The account summary at the bottom provides totals for services and expenses billed to date, previous invoice information, and payment amounts.

## How to Run the Invoice

You can run this invoice from the Invoice Review screen. To change the current invoice template to Manual Invoices, open the Invoice Selection screen and select Manual Invoices, Manual Invoice.rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

## More Manual Invoices

- *Finance Charge Invoice:* Provides client with the finance charges associated with the work done on projects. Organized by project, this invoice displays the description of the charge, charge amount, and total amount due along with the Billing From-To dates.
- *Finance Charge Void Invoice:* This is a void invoice format showing finance charges associated with projects. Organized by project, this invoice displays the description of the charge, charge amount, and total amount due along with the Billing From-To dates.
- *Manual Cost Plus Details:* Provides client with billing information for the services rendered on a project. Organized by project, this invoice displays the service details including Billing From-To dates, tax, bill amount, fixed fee, discount and amount due along with an account summary.
- *Manual Invoice (units & rate):* This is a manual invoice format providing details about the services and reimbursable expenses along with the Billing From-To dates. Organized by project, the invoice lists service and expense items along with their description, units, cost, tax and charge amount. It also displays the amount due along with an account summary.
- *Manual Invoice Itemized:* This is a manual invoice format with itemized details along with the Billing From-To dates. Organized by project, the invoice lists service and expense items along with their description, cost, tax, and bill amount. It also displays the amount due along with an account summary.
- *Manual Invoice (Contract Sum):* Provides client with billing information for the services rendered and reimbursable expenses charged for work done on projects along with the Billing From-To dates. Organized by project, this invoice displays the contract amount, amount billed and amount remaining. It also includes details such as description, cost, tax, bill amount, discount, and amount due along with an account summary.

- *Manual Invoice (with % complete) (no tax):* Provides client with billing information based on percent complete along with the Billing From-To dates. Organized by project, the invoice displays services and reimbursable expenses with cost, percent complete, bill amount, retainer applied, and so on along with an account summary.
- *Manual Invoice (with % complete):* Provides client with billing information based on percent complete with tax values along with the Billing From-To dates. Organized by project, the invoice displays services and reimbursable expenses with cost, tax, percent complete, bill amount, retainer applied, amount due, and so on along with an account summary.
- *Manual Invoice (without tax):* Provides client with billing information for the services rendered and reimbursable expenses charged for work done on projects along with the Billing From-To dates. Organized by project, the invoice displays the bill amount, main taxes, discount and amount due along with an account summary.
- *Manual Void Invoice:* This is a void invoice format for manual billing. Organized by project, the invoice displays a summary of total services and expenses, discounts and retainers applied, amount paid, amount due along with the Billing From-To dates.

## Phased Invoices

### Phased Invoice

#### Hendricks Consulting LLC

2601 Airport Drive, Suite 380  
Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

#### Invoice

Invoice Date: Jan 23, 2016  
Invoice Num: 1205  
Billing Through: Jan 1, 2016

Ms. Carolyn Summer  
City Services Dept.  
123 Main Street  
First Floor  
Your Town, CA 90500

Phase ID	Phase Description	% of Total Fee	Contract Amount	% Complete	Contract Billed To Date	Current Services	Current Expenses
09-PV Country Club: - PV Country Club			\$73,115.00		\$36,743.75	\$1,125.00	\$161.15
▶ <u>Date</u>	<u>Description</u>			<u>Hours</u>	<u>Rate</u>	<u>Amount</u>	
4/6/2015	DESIGN CALCULATIONS			5.00	\$225.00	\$1,125.00	

Amount Due This Invoice: **\$1,286.15**

*This Invoice is due upon receipt*

#### Account Summary

Billed To Date	Paid To Date	Balance Due
\$ 42,504.82	\$ 39,201.32	\$ 3,303.50

Thank you for your business!

### Description

The Phased Invoice represents joint billing details for projects with multiple phases under them. The parent project may be having an Active or Main status, while the phases can have any status. The phased invoice shows the percentage of completion of each phase and also their total earned value. Organized by parent project, it provides details about the phases such as percentage of total fee, contract amount, previously billed amounts, currently billed services and expenses along with an account summary at the bottom.

### How to Run the Invoice

You can run this invoice from the Invoice Review screen. To change the current invoice template to Phased Invoices, open the Invoice Selection screen and select Phased Invoices, Phased Invoice.rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

Phased Invoice Summarized with Expenses

**Hendricks Consulting LLC**

2601 Airport Drive, Suite 380  
Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

**Invoice**

**Invoice Date:** Jan 23, 2016  
**Invoice Num:** 1218  
**Billing Through:** Jan 1, 2017

Mr. Bob Hillard  
Hillard New Residence  
1210 Via Vilmonte  
Palos Verdes, CA 97141

**Hillard Residence (10-Hillard Resd:) - Managed by (CJ)**

**Schematic Design (10-Hillard:1-SD)**

Contract Amount	% Complete	Prior Billings	This Invoice
\$20,000.00	50.00%	\$12,985.00	\$0.00

**Design Development (10-Hillard:2-DD)**

Contract Amount	% Complete	Prior Billings	This Invoice
\$10,000.00	25.00%	\$9,432.50	\$0.00

**Construction Documents (10-Hillard:3-CD)**

Contract Amount	% Complete	Prior Billings	This Invoice
\$50,000.00	50.00%	\$28,200.00	\$0.00

**Construction Administration (10-Hillard:4-CA)**

Contract Amount	% Complete	Prior Billings	This Invoice
\$20,000.00	25.00%	\$40,585.00	\$0.00

Sub-total      \$100,000.00      \$91,202.50      \$0.00

**Total Amount Due:** \$0.00

*This Invoice is due upon receipt*

**Account Summary**

Billed To Date	Paid To Date	Balance Due
\$ 70,783.50	\$ 48,500.00	\$ 22,283.50

Thank you for your business!

**Description**

You may bill one phase or all phases of a project on a joint invoice. It includes completed and not yet started phases. The Phased Invoice represents joint billing details for projects with multiple phases under them. Organized by parent project, it provides information such as project phase ID, contract amount, previously billed and due amounts and an account summary at the bottom. This phased invoice also shows the percentage of completion of each phase and also their total earned value.

**How to Run the Invoice**

You can run this invoice from the Invoice Review screen. To change the current invoice template to Phased Invoices, open the Invoice Selection screen and select Phased Invoices, Phased Invoice.rpc from the list. You can preview its sample on the right panel and finalize it by clicking OK.

Phased Mixed Invoice (By Classification)

**Hendricks Consulting LLC**

2601 Airport Drive, Suite 380  
Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

**Invoice**

**Invoice Date:** Jan 23, 2016  
**Invoice Num:** 1224  
**Billing Through:** Jan 23, 2016

Ms. Lynn Tracey  
Allied Technology  
1616 Adventure Way  
Sunnyside, CA 95000

**Housing (01) - Managed by (RC)**

Phase ID	Phase Description	% of Total Fee	Contract Amount	% Complete	Contract Billed To Date	Current Services	Current Expenses
Housing 01	Housing 01		\$0.00			\$160.00	\$0.00
	<b>Classification</b>			<b>Hours</b>	<b>Rate</b>	<b>Amount</b>	
	System Administrator						
	Allen Marcello			2.00	\$80.00	\$160.00	

Amount Due This Invoice: **\$160.00**

*This Invoice is due upon receipt*

**Account Summary**

Billed To Date	Paid To Date	Balance Due
\$ 160.00	\$ 0.00	\$ 160.00

Thank you for your business!

**Description**

This invoice represents joint billing details for mixed projects that have multiple phases with different contract types, such as fixed and hourly. Besides the fixed part, the hourly part is summarized and grouped by job classification, along with an account summary at the bottom.

Phased Mixed Invoice (By Description)

**Hendricks Consulting LLC**

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Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

**Invoice**

Invoice Date: Jan 23, 2016  
Invoice Num: 1226  
Billing Through: Jan 23, 2016

Ms. Lynn Tracey  
Allied Technology  
1616 Adventure Way  
Sunnyside, CA 95000

**Housing (01:) - Managed by (RC)**

Phase ID	Phase Description	% of Total Fee	Contract Amount	% Complete	Contract Billed To Date	Current Services	Current Expenses
Housing 01 - Housing 01			\$0.00			\$250.00	\$0.00
	► <u>Description</u>			<u>Hours</u>	<u>Rate</u>	<u>Amount</u>	
	Building Department Liason			1.00	\$110.00	\$110.00	
	Design Calculations			2.00	\$70.00	\$140.00	
Housing 02 - Housing 02			\$0.00			\$290.00	\$0.00
	► <u>Description</u>			<u>Hours</u>	<u>Rate</u>	<u>Amount</u>	
	Building Department Liason			2.00	\$70.00	\$140.00	
	Cad Plotting			1.00	\$150.00	\$150.00	

Amount Due This Invoice: \$540.00

*This Invoice is due upon receipt*

**Account Summary**

Billed To Date	Paid To Date	Balance Due
\$ 860.00	\$ 0.00	\$ 860.00

Thank you for your business!

**Description**

This invoice represents joint billing details for mixed projects that have multiple phases with different contract types, such as fixed and hourly. Besides the fixed part, the hourly part is summarized and grouped by service or expense item description, along with an account summary at the bottom.

Phased Mixed Invoice (By Employee)

**Hendricks Consulting LLC**

2601 Airport Drive, Suite 380  
Los Angeles, CA 90505  
Tel: (310) 555-1212 Fax: (310) 555-2121  
admin@hendricks\_consulting.com  
www.hendricks\_consulting.com

**Invoice**

Invoice Date: Jan 23, 2016  
Invoice Num: 1226  
Billing Through: Jan 23, 2016

Ms. Lynn Tracey  
Allied Technology  
1616 Adventure Way  
Sunnyside, CA 95000

Housing (01:) - Managed by (RC)

Phase ID	Phase Description	% of Total Fee	Contract Amount	% Complete	Contract Billed To Date	Current Services	Current Expenses
Housing 01 - Housing 01			\$0.00			\$250.00	\$0.00
▶ <u>Employee</u>	<u>Description</u>			<u>Hours</u>	<u>Rate</u>	<u>Amount</u>	
Bert Woolmer	Building Department Liason			1.00	\$110.00	\$110.00	
Bob Duncan	Design Calculations			2.00	\$70.00	\$140.00	
Housing 02 - Housing 02			\$0.00			\$290.00	\$0.00
▶ <u>Employee</u>	<u>Description</u>			<u>Hours</u>	<u>Rate</u>	<u>Amount</u>	
Bob Duncan	Building Department Liason			2.00	\$70.00	\$140.00	
Curtis James	Cad Plotting			1.00	\$150.00	\$150.00	

Amount Due This Invoice:           \$540.00

*This Invoice is due upon receipt*

**Account Summary**

Billed To Date	Paid To Date	Balance Due
\$ 860.00	\$ 0.00	\$ 860.00

Thank you for your business!

**Description**

This invoice represents joint billing details for mixed projects that have multiple phases with different contract types, such as fixed and hourly. Besides the fixed part, the hourly part is summarized and grouped by employee along with an account summary at the bottom.

## More Phased Invoices

- *Phased Invoice Summarized with Expenses (with Exp CR and Units):* Organized by project, this invoice provides client with summarized billing information about the phased projects. It displays service details such as contract amount, percent complete, and bill amount, and expense details such as date, description, cost rate, units, and charge amount. This invoice also displays the main taxes along with an account summary.
- *Phased Invoice with Expenses (with Exp CR and Units):* Organized by project, this invoice provides client with billing information about the phased projects. It displays the expense entry details such as units, costs, and charge amount, besides the service details. This invoice also displays an account summary.
- *Phased Invoice with Expenses:* Organized by project, this invoice provides client with summarized billing information about the phased projects. It displays service details such as contract amount, percent complete, and bill amount, and expense details such as date, description, units, cost, and charge amount. This invoice also displays the main taxes along with an account summary.
- *Phased Void Invoice:* This is a void invoice format for phased projects. Organized by project phase, the invoice displays the total services and expenses along with the amount due.



## World Headquarters

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