Working with Progress Billing

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For long-term projects or larger orders, you can use progress billing, sending invoices for portions of the work as milestones are achieved. Progress billing records generate deposit invoices for the customer . When you open a progress billing invoice, it credits a deposit on the General Ledger, and when you issue the final invoice, it serves as the revenue-recognition invoice, reversing the existing deposits.

Note: Invoices generated from progress billing records are *not* linked to shipments: if you *first* create an invoice using progress billing, then ship a shipment, aACE will *not* auto-generate an invoice for that shipment, even if your system is configured with the 'Auto-generate invoices on shipment' preference. (Note: If you ship a shipment *before* creating a progress billing record, aACE will auto-generate a regular invoice.)

Navigate to the Projects or Orders modules' Billing tab to access the Progress Billing portal:

Creating Invoices with Progress Billing

Manually

1. At the Progress Billing portal, specify the invoice date, then enter the title, description, and item description, as needed.
2. Enter the dollar amount or the percentage of the *total order* that the invoice covers in the **Amt/Pct** field.
3. Click the **Create** link.
   aACE generates the progress billing invoice, with the DEPOSIT line item code showing the amount or percentage you specified.

Automatically with Automation Schedules

You can enter data for multiple progress billing records, then let aACE process them at the correct times. When the 'Auto-Generate Progress Billing Invoices' automation schedule runs, it checks your open orders and projects for progress billing records that have the current date. For these records, it auto-generates the deposit invoice.

Your system administrator can [configure this automation schedule](#) to run at the best times for your organization.

Completing a Progress Billing

When the project or order is at completion (whether or not the *entire* payment has been covered by progress billing invoices), you can generate the revenue-recognition invoice from the Progress Billing section by clicking the Create Final Invoice link.