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3.4 Invoicing

The invoice module serves the purpose of drawing up offers and invoices as well as internal settlement, enables the drawing up and further charging of incoming invoices and monitors incoming and outgoing payments.

With the foreign invoices component (see illustration 15), you have the possibility to record services by suppliers and to charge them to the project (incoming invoices). The outgoing invoice function provides an overview of all payments to your creditors.

Projectile supports several versions for the invoicing of services (see illustration 16): Outlays, fixed price, anticipated payment, completion and periodical invoicing. With the aid of various price models (project-related, customer-related, employee-related or combinations of these), you can invoice your customer in a flexible way depending on the agreement.

In the case of expenditure projects, you simply select the project or the sub-project you would like to invoice; Projectile enters all of the services that can be invoiced (jobs, receipts, travelling costs and other costs) into the invoice, whereby you can alter individual positions. Finally, you can have the invoice shown, have it printed out if desired and charge the services. On request, Projectile draws up the invoices/internal statements automatically at freely definable points in time (for example, at the end of the month/quarter for maintenance contracts or invoices for domains). Proof of time required for charging to your customary or "internal customer" can also be drawn up by Projectile at the touch of a button.

Fremdrechnung 03989

Dokument Bearbeiten Ansicht Aktionen

Stammblatt Faktura Alle

Rechnung

Bezeichnung

Lieferant [Information Desire Software GmbH](#)

Status Rechnung fakturiert

Zeitspanne von bis

Betrag EUR

Brutto EUR

Mitarbeiter [Schaub Peter](#)

Rechnungsdatum

Buchungsdatum

Original-Rechnung

Original-Bestellung

Bemerkung

Fremdrechnungspositionen

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		Position	Bezeichnung	Netto	Projekt
	<input type="checkbox"/>	3-1	Java-Entwicklung	2.300,00	DB03 DB Bahn
	<input type="checkbox"/>	3-2	MySQL-Entwicklung	3.400,00	CS07 Einführung Projectile

Zahlungsausgänge

[1] [03989](#)

Illustration 15: Recording or import of incoming invoices

If you have invoiced your services, the corresponding invoice data rate will be adopted in the incoming payments. Projectile thus informs you of the status of payment and if desired, generates reminders.

The screenshot shows a software interface for generating invoices. On the left is a form with the following fields:

- Rechnungs-ID: 4
- Rechnungsnummer: CS-06-06-11
- Projekt: CS07 Einführung Projectile
- Status: Rechnung fakturiert
- Zeitspanne: von [] bis []
- Betrag: 8.090,52 EUR
- Umsatzsteuer: MwSt-D-Voll
- Brutto: 9.385,00 EUR
- Abrechnungsart: Aufwand
- Abschlag: [] %
- Angebot: CS-06-06-6
- Mitarbeiter: Schaub Peter
- Rechnungsdatum: 26.06.2006
- Original-Rechnung: []
- Bemerkung: []

Below the form is a table of 'Rechnungspositionen':

Position	Bezeichnung	Anzahl	Einheit	Preis	Summe
4-1	Arbeitspaket CS07.1-1 Konzeptgespräche	8,00	h		
4-2	Arbeitspaket CS07.1-1 Konzeptgespräche	4,00	h	0,5	
4-3	Arbeitspaket CS07.1-2 Pflichtenheft erstellen	8,00	h	1 Pt	800,00
4-4	Reise 115 Schaub Peter Workshop	1,00	h	0,125 Pt	1.087,90
4-5	Reise 116 Schröder Sandra Workshop	1,00	h	0,125 Pt	1.002,62
4-6	Fremdrechnungspositionen 3-2 MySQL-Entw	1,00	h	0,125 Pt	4.000,00

At the bottom left, there is a 'Zahlungseingänge' section with a checkbox for 'CS-06-06-11'.

The right side shows a preview of the invoice in a Microsoft Word document. The invoice header includes:

Information Desire Software GmbH · An der Brunnenstraße 25 · D - 55120 Mainz
CONSULT GmbH
 Frau Lisa Nahl
 Hauptstraße 23
 80700 München

Summary table:

Datum:	26.06.2006
Kundennr.:	410
Bearbeiter:	Peter Schaub
Telefon:	- 11
Ihre Bestellung:	547800
Lieferantenr.:	230090

Rechnung 0004
 Rechnungsnummer: CS-06-06-11
 Projekt: Einführung Projectile

Main invoice table:

Pos.	Bezeichnung	Menge	Preis	Summe
01	CS07.1-1 Konzeptgespräche	12,00	100,00 €	1.200,00 €
02	CS07.1-2 Pflichtenheft erstellen	8,00	100,00 €	800,00 €
03	MySQL-Entwicklung	1,00	4.000,00 €	4.000,00 €
04	Reise 115 Schaub Peter Workshop	1,00	1.087,90 €	1.087,90 €
05	Reise 116 Schröder Sandra Workshop	1,00	1.002,62 €	1.002,62 €
			Gesamt Netto	8.090,52 €
			MwSt.: 16%	1.294,48 €
			Gesamt Brutto	9.385,00 €

Illustration 16: Drawing up an invoice

The contracts in Projectile administer periodical invoicing with their general conditions. This functionality can, for example, be used for maintenance and support contracts. This function also supports the definition of payment plans according to milestones, deadlines and freely selectable dates.

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