

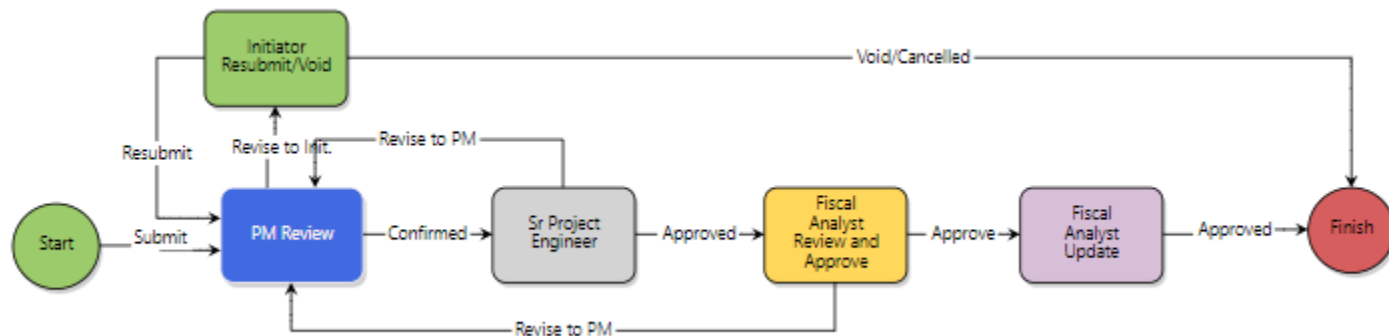
Consultant Invoices





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Consultant Invoices





Consultant Invoices (cont.)

Initiators:

Who can start this process?	Ext - Consultant Engineering Ext - Materials Testing Project Manager
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Participants:

- Consultant
- Inspector
- Project Manger
- Senior Project Engineer
- Fiscal Analyst



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Consultant Step (Initiator)

The consultant attaches and completes all (*) fields and any additional information they would like to attach.

Note, it is required that an updated project schedule/status and MWBE is provided by the consultant on a monthly basis in order to process.

Consultant Invoices (cont.)

Invoice - Consultant Invoice (INV)			
Project:		Project Number:	
Process Document:	Invoice - Consultant Invoice	Overall Due Date:	
Current Workflow Step:		Step Due Date:	
* Subject:	<input type="text"/>		
Status:			
Attachments			
* Invoice/Receipts:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/>
* Status Update:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/>
* MWBE Certified Subcontractor Payment Form:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/>
Testing Results:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/>
Certified Payroll (if applicable):	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/>
Receipts:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/>
* MBE Portion of this Invoice (\$):	<input type="text"/>		
* WBE Portion of This Invoice (\$):	<input type="text"/>		

Continued...

Consultant Invoices (cont.)



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Consultant Step (Initiator)

The consultant then selects the correct commitment (their specific contract) from the pull-down list and completes all (*) fields.

This will open their commitment information. The consultant will edit “Invoice Amount” field.

Commitment Invoice Details

Status: Draft

* Commitment:

Company/Contact:

* Date Received: [02.08.2021]

Date Due:

This is a retainage release:

Commitment Invoice Details

Status: Approved

Commitment: 001 - North Ridge Professional Services

Company/Contact: BROWN & CALDWELL INC

Date Received: 11.23.2020

Date Due: 12.01.2020 (John Verdejo)

This is a retainage release:

Commitment Invoice Custom Fields

There are no invoice custom fields.

Invoice Items Show Approved Commitment Items

Commitment Item #	Description	Budget Line Item	Current Commitment	Invoiced To Date	Retained To Date	Remaining to be Invoiced	Invoice Amount	Retainage %	Retained This Invoice	Custom Field(s)
001	North Ridge Phases 4 & 5 - Construction Administr...	30.793080.030	230,896.00	147,100.35	0.00	83,795.65	10,163.00	0.00 %	0.00	
Total			230,896.00	147,100.35	0.00	83,795.65	10,163.00		0.00	

Cost Summary | Commitment Details | Invoices For This Company

“Submit” to the Project Manager



Consultant Invoices (cont.)



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Project Manager Step

PM reviews information from the consultant. The PM will either select “**Confirmed**” or “**Revise to Init.**” to make edits or delete/void if necessary (comments will be required).

MBE/WBE Information		
	MBE (decimal):	<input type="text"/>
	WBE (decimal):	<input type="text"/>

“Submit” to the Senior Project Engineer



Consultant Invoices (cont.)



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Senior Project
Engineer Step

Senior Project Engineer reviews information from everyone. The PM will either select “**Approved**” or “**Revise to PM**” to make edits or reach back out to the consultant to address concerns (comments will be required).

“Approved” to the Fiscal Analyst





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Fiscal Analyst Review and Approve Step

Review all uploaded documents, MWBE information, and complete and upload required fiscal information.

Consultant Invoices (cont.)

Updates	
* Amount Receipt:	<input type="text"/>
* Receipt Number:	<input type="text"/>

Some of the required information is generated outside of e-Builder and comes from PeopleSoft Financials.




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Fiscal Analyst Update Step

The process will return to the Fiscal Analyst again. The analyst will wait for Accounts Payable to cut the check (net 30 days) and complete required information. e-Builder will occasionally send reminder emails to the Fiscal Analyst.

Consultant Invoices (cont.)

Updates	
Amount Receipt:	<input type="text"/>
Receipt Number:	<input type="text"/>
* Voucher Number:	<input type="text"/>
* Sales Tax:	<input type="text"/>
* Check Number:	<input type="text"/>
* Date Paid:	<input type="text"/> 

The Status is now Approved. 

Enter required information when available. Then select “**Approved**”.