

Invoice Backup

Description: The Invoice Backup allows the user to query all invoices by business unit, company, project and agreement for a specified period of time.

Purpose: To provide the user the ability to see the detail that makes up individual invoices, including date, detail, member, hourly rate and hours. The report gives the user the ability to view this information on one screen, rather than navigating to multiple screens within ConnectWise.

Criteria

Parameter	Description
Begin Date	This parameter defines the begin date for the respective invoice being searched.
End Date	This parameter defines the end date for the respective invoice being searched.
Business Unit	This parameter defines the respective business unit for query.
Company	Company parameter for which the user wants to see invoice details. All companies may be selected as well.
Project	Project(s) associated with the company select. One project or all can be selected.
Agreement	Agreement(s) associated with the company selected. One agreement or all can be selected.
Show Hourly Rate	Check box to select for displaying the hourly rate.
Format For Excel	Check box to select to indicate if report should be formatted for Excel.

Report Fields

Report Field	Description	ConnectWise Screen	ConnectWise Field
Date	The date that the member completed the work that is being billed on the invoice.	Time Sheet	Date
Details	The detail entered by the member, for work completed for the customer.	Time Sheet	Notes
Engineer	The member that performed the work.	Time Sheet	Member
Hourly Rate	The rate that was charged per the project or if an hourly rate is specified for the agreement(T&M).	Project Board	Billing Rates
Invoiced Hours	The hours invoiced for the individual work completed.	Invoice	Inv Hours

Report Calculations

Calculation	Description
Total Hours	Sum of the total hours for the individual invoice.