	<p>QUALITY MANAGEMENT SYSTEM ISO 9001:2015</p>	Document No.:
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<p>Document Title: RECEIVING OF PROJECT PROGRESS BILLING BASED ON MILESTONE VIA SALES MODULE</p>		

1. PURPOSE

Milestone is used to divide a project, service, or contract into measurable stages or achievements. It helps to track and monitor project progress. It controls project billing and payment based on completed milestones rather than full project completion.

2. SCOPE

The scope of milestones covers planning, execution, monitoring, and invoicing activities related to projects or services.

a. Project Planning

- Divide projects into phases or targets
- Assign deadlines and responsibilities

b. Task and Progress Monitoring

- Link milestones to project tasks
- Track completion percentage and status

c. Sales Order Integration

- Connect milestones to sales orders for service contracts
- Define milestone-based billing terms

d. Invoicing

- Generate invoices when milestones are achieved
- Support partial or staged payments

e. Customer Deliverables

- Manage acceptance and approval of completed work stages

f. Reporting and Analytics

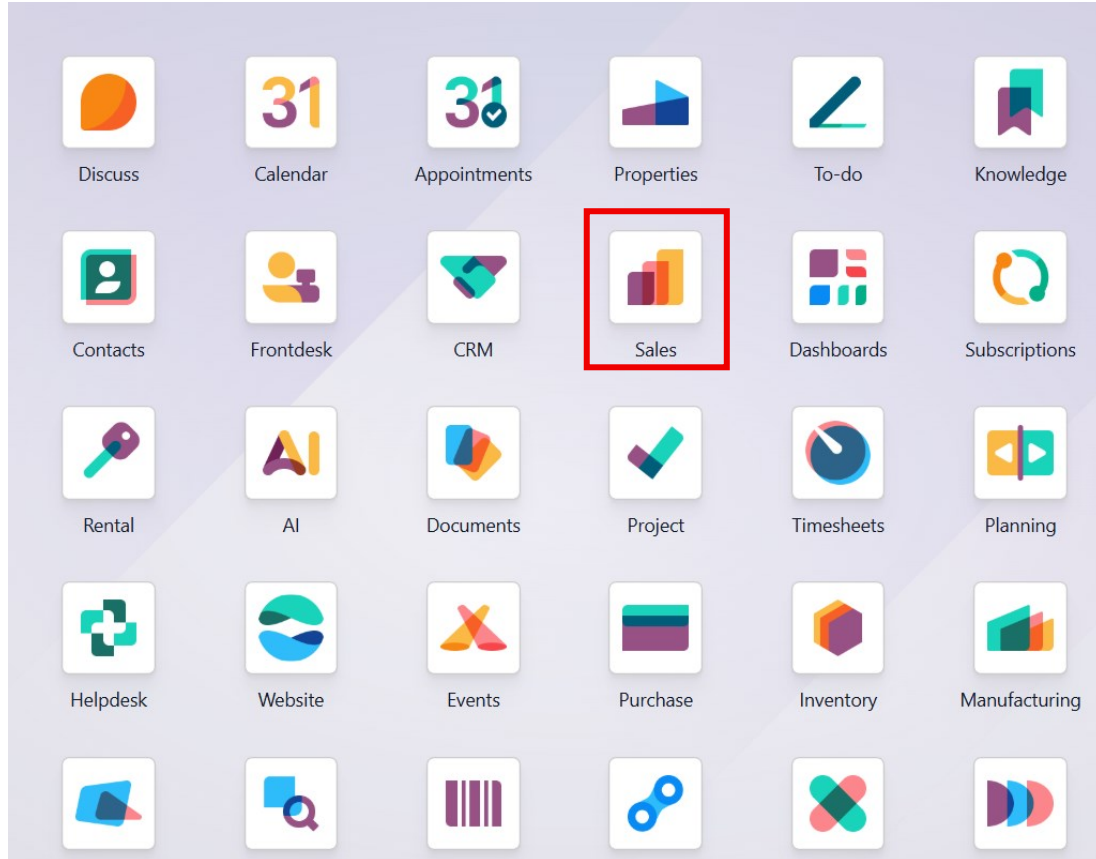
- Monitor project timelines
- Analyze project performance and delays

3. RESPONSIBILITIES

Example:	Role	Responsibility
	Accountant	Recording, monitoring, reporting
	Finance Manager	Review and approval
	Project Manager	Submission of billing and cost data
	Admin/Other Departments	Submission of supporting documents

4. PROCEDURES

Step 1. Go to “Sales Module”



Step 2. Search the Sales Order Number on the search box below (e.g. S00542).

Sales Orders To Invoice Products Commissions

New Quotations

Q Search...

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Number	Creation Date	Customer	Website	Salesperson	Activities	Company	Total	Status
<input type="checkbox"/> S00533	Apr 28, 11:39 AM	Sitio Buffalo Fresh Farm Corporation			⊙	Arky Construction and Supply	1,262.00 ₱	Quotation
<input type="checkbox"/> S00529	Apr 27, 4:10 PM	E.O.O Engineering Services		Ann Nicole Caballero	⊙	Arky Construction and Supply	4,686.00 ₱	Sales Order
<input type="checkbox"/> S00513	Apr 23, 12:07 PM	Public user	Arky Const...		⊙	Arky Construction and Supply	1,800.00 ₱	Quotation
<input type="checkbox"/> S00512	Apr 22, 5:25 PM	Sitio Buffalo Fresh Farm Corporation			⊙	Arky Construction and Supply	315.50 ₱	Quotation
<input type="checkbox"/> S00493	Apr 16, 11:02 AM	AIREN B. REPONTE	Arky Const...		⊙	Arky Construction and Supply	1,800.00 ₱	Quotation
<input type="checkbox"/> S00487	Apr 15, 1:14 PM	Public user	Arky Const...		⊙	Arky Construction and Supply	900.00 ₱	Quotation
<input type="checkbox"/> S00454	Mar 21, 10:35 AM	Sitio Buffalo Fresh Farm Corporation		Ann Nicole Caballero	⊙	Arky Construction and Supply	1,620.92 ₱	Sales Order
<input type="checkbox"/> S00453	Mar 19, 4:46 PM	Public user	Arky Const...		⊙	Arky Construction and Supply	2,343.00 ₱	Quotation
<input type="checkbox"/> S00451	Mar 19, 11:09 AM	Kimberly Corpuz	Arky Const...		⊙	Arky Construction and Supply	1,800.00 ₱	Quotation
<input type="checkbox"/> S00450	Mar 17, 10:51 AM	Ykra Corporation		Ann Nicole Caballero	⊙	Arky Construction and Supply	28,000.00 ₱	Quotation
<input type="checkbox"/> S00440	Mar 9, 9:28 PM	Sitio Buffalo Fresh Farm Corporation			⊙	Arky Construction and Supply	422.00 ₱	Quotation
<input type="checkbox"/> S00252	Nov 24, 2025, 12:59 PM	Antonette Lim		Ann Nicole Caballero	⊙	Arky Construction and Supply	13,054,363.35 ₱	Sales Order
<input type="checkbox"/> S00375	Feb 4, 7:34 PM	Sitio Buffalo Fresh Farm Corporation		Ann Nicole Caballero	⊙	Arky Construction and Supply	201.00 ₱	Sales Order

Step 3. Click the Sales Order you've searched.

Sales Orders To Invoice Products Commissions

New Quotations Search... 1-1 / 1

Number	Creation Date	Customer	Website	Salesperson	Activities	Company	Total	Status
S00542	May 8, 11:56 AM	LGU Milagros Masbate		Ann Nicole Caballero		Arky Construction and Supply	6,000,000.00 P	Sales Order
							6,000,000.00 P	

Step 4. Click "Milestone".

Sales Orders To Invoice Products Commissions

New Quotations S00542 1 Projects 1 Tasks 1 Milestones

Create Invoice Send PRO FORMA Invoice Send Preview Quotation Quotation Sent Sales Order

S00542 Locked

Customer: LGU Milagros Masbate, Poblacion Milagros Masbate, Philippines
 Invoice Address: LGU Milagros Masbate
 Delivery Address: LGU Milagros Masbate
 Order Date: May 8, 1:56 PM
 Payment Terms: Immediate

Product	Quantity	Delivered	Invoiced	Unit	Unit Price	Taxes
Project	6,000,000.00	0.00	0.00	PHP	1.00	0.0

Activity Log:

- Kimberly L. Corpuz 1:56 PM: Quotation confirmed. Quotation → Sales Order (Status). No → Yes (Locked).
- Kimberly L. Corpuz 1:56 PM: @Ariel Lim, @Kimberly Corpuz, Approved
- Ann Nicole Caballero 12:00 PM: 1.00 P → 6,000,000.00 P (Total). 1.00 P → 6,000,000.00 P (Untaxed Amount)
- Ann Nicole Caballero 12:00 PM: 0.00 P → 1.00 P (Total). 0.00 P → 1.00 P (Untaxed Amount)
- Ann Nicole Caballero 11:56 AM: Sales Order created

Step 5. Click "Filter Record".

Sales Orders To Invoice Products Commissions

New Quotations / S00542 Milestones 1-1 / 1

Name	Sales Order Item	Quantity (%)	Deadline	Reached	
Project	S00542 - Project (LGU Milagros Masbate)	50%	May 8	<input checked="" type="checkbox"/>	View Sales Order

Step 6. Tick the "Quantity".

Sales Orders To Invoice Products Commissions

New Quotations / S00542 Milestones 1-1 / 1

Name	Sales Order Item	Quantity (↕)	Quantity	Deadline	Reached	
Project	S00542 - Project (LGU Milagros Masbate)	50%	3,000,000.00	May 8	<input checked="" type="checkbox"/>	View Sales Order

Quantity
 Deadline
 Reached

Step 7. Input the amount of quantity to be received. (Ex. 3,000,000)

Sales Orders To Invoice Products Commissions

Save Discard Quotations / S00542 Milestones

Search...

1-1 / 1

Name	Sales Order Item	Quantity (%)	Quantity	Deadline	Reached
Project	S00542 - Project (LGU Milagros Masbate)	0%	3,000,000.00	May 8	<input type="checkbox"/>

[View Sales Order](#)

Note: Quantity in percentage will be *automatically* computed.

Step 8. Tick the box below reached.

Sales Orders To Invoice Products Commissions

Save Discard Quotations / S00542 Milestones

Search...

1-1 / 1

Name	Sales Order Item	Quantity (%)	Quantity	Deadline	Reached
Project	S00542 - Project (LGU Milagros Masbate)	50%	3,000,000.00	May 8	<input checked="" type="checkbox"/>

[View Sales Order](#)

Step 9. Click "View Sales Order"

Sales Orders To Invoice Products Commissions

Save Discard Quotations / S00542 Milestones

Search...

1-1 / 1

Name	Sales Order Item	Quantity (%)	Quantity	Deadline	Reached
Project	S00542 - Project (LGU Milagros Masbate)	50%	3,000,000.00	May 8	<input checked="" type="checkbox"/>

[View Sales Order](#)

Step 10. Then the input quantity will be viewed under delivered quantity.

Sales Orders To Invoice Products Commissions

New / S00542 / Milestones

1 Projects 1 Tasks 1 Milestones

1 / 1

Create Invoice Send PRO FORMA Invoice Send Preview

Quotation Quotation Sent Sales Order

S00542 Locked

Customer LGU Milagros Masbate Order Date? May 8, 1:56 PM
Poblacion Milagros Masbate Philippines Payment Terms Immediate

Invoice Address LGU Milagros Masbate
Delivery Address LGU Milagros Masbate

Quotation Template

Product	Quantity	Delivered	Invoiced	Unit	Unit Price	Taxes
Project	6,000,000.00	3,000,000.00	0.00	PHP	1.00	0.00

[Add a product](#) [Add a section](#) [Add a note](#) [Catalog](#)

Send message Log note WhatsApp Activity

Today

Kimberly L. Corpuz 1:56 PM
Quotation confirmed
Quotation → Sales Order (Status)
No → Yes (Locked)

Kimberly L. Corpuz 1:56 PM
@Ariel Lim, @Kimberly Corpuz, Approved 🟢

Ann Nicole Caballero 12:00 PM
1.00 ₱ → 6,000,000.00 ₱ (Total)
1.00 ₱ → 6,000,000.00 ₱ (Untaxed Amount)

Ann Nicole Caballero 12:00 PM
0.00 ₱ → 1.00 ₱ (Total)
0.00 ₱ → 1.00 ₱ (Untaxed Amount)

Ann Nicole Caballero 11:56 AM
Sales Order created

Step 11. Click "Create Invoice".

The screenshot shows the software interface for creating an invoice. The 'Create Invoice' button is highlighted with a red box. The interface includes a navigation bar with 'Sales', 'Orders', 'To Invoice', 'Products', and 'Commissions'. The main area displays the invoice details for 'S00542', including customer information (LGU Milagros Masbate), order date (May 8, 1:56 PM), and payment terms (Immediate). A table lists the product 'Project' with a quantity of 6,000,000.00, delivered amount of 3,000,000.00, and unit price of 1.00 PHP. The 'Sales Order' button is also visible in the top right.

Step 12. Choose "Regular Invoice".

The screenshot shows the 'Create invoice(s)' dialog box. The 'Regular invoice' option is selected and highlighted with a red box. The dialog box also includes options for 'Down payment (percentage)' and 'Down payment (fixed amount)'. The background shows the same invoice details as in Step 11, with the 'Sales Order' button highlighted.

5. RECORDS

