**Enabling activity lookup for contract level billing.**

**Problem statement**

In the Generate invoice screen, user can create PostPay-Actual invoice for contract level (Invoice level on Job billing tab) billing. The current change is applicable on Contract level billing only and will not affect Job bill setup for this screen. Job level billing will work the same way as it is working now.

In the current setup if user select Contract, then user can filter billing options based on Contract, Job and Activity. The activity lookup only works if the same Job is provided in the form and to filter for Job. If the range of Jobs is provided, then Activity lookup is disabled.

However, when Generate invoice process is started the screen does not pass the Activity parameters in any scenario.

**Suggested Change**Following changes will be made on Generate Invoice UI to accommodate this enhancement.

**Category Option:**  
New section for category selection will be added on generate invoice UI. This option will allow users to filter specific transaction category to bill. This section / filter will have following options.

1 -Time  
3- Expense  
4 – Studio  
  
Based on category selection, system will bill only selected category. For example, if Time is selected than system will pick only time transactions for processing.   
Please note. System will use this category filter to pick prebill as well. For Example, if “PostPay – Actual” option is selected with “Apply Prebill” than system will pick only Time prebill and Time Actuals. Same is applicable if user selects final invoice. System will only pick Time transactions to generate Final invoice.  
Another option is to disable this category filter for final invoice so.

**Level 3 Selection for Contract Billing**

The change will be applicable only for **PostPay-Actual** billing option with or without Apply Pre Bill and Final Invoice options

The change is recommended to allow user to select the activity or range of activities if the Job is provided or the range of job is selected. User can also select the activity or range of activities without selecting any job or range of jobs.

The change will work as follows pertaining to fields affected by this change:

1. Select Contract for billing option
2. Select Contract or range of Contracts or user can keep the current selection of First and Last
3. Select Job or range of Jobs or user can keep the current select of First and Last
4. If the Contract or range of contract is provided the Job lookup will display only jobs tagged to the range of Contracts
5. Select Activity or range of Activities or user can keep the current select of First and Last
6. The Activity lookup will show the Activities based on the select made in the Job range. The lookup will show/list all (distinct) the activities for the range of Job filter.
7. If the Job range is not provided (First and Last option is used) then Activity lookup will show all the activities (distinct) based on the jobs under the Contract selection range
8. The lookup for Activity will be disable if no range is selected for Contract or Job. User can only type in the Activities in from and to fields.
9. **Question**: Should it be mandatory to select at least option checkbox?

For details, see the email reference at the end of document.

A screenshot of a computer

Description automatically generated

**Reference to eMail**

**RE: Issues on Actualizing Prebills with both Labor and Expenses (NEX-10715)**

Scenario: See Sam’s email below. Summarizing here: When we have Prebills and Actuals for both Time and Expenses, Generate invoice with Apply prebill/final invoice picks both Time and Expense activity. If user needs to reconcile just Time they can select Time activity on generate invoice. In order to enable Activity lookup one must select same job in from and to.

However if it is ‘Master job’ (L1) billing, then there is no way to select Activity applicable to jobs under that Master job.

On a side note, even if we do ‘Master job’ billing, select same job in from and to, select Time activity, it still picks up both activities (Works fine when Job is set to billing level =2).

Change needed: Enable Activity lookup for Master Level billing once Master is selected in from and to. The list of activities should be Distinct L3s across L2s (which has billing level =1) under that L1.

This way if we select L1 and L3 without L2, user can reconcile on Just Time or Expense.

Looks like we will need to make JS change to enable L3 lookup and pass L1 key to SP [pdsW\_lookup\_level3\_search\_new]. The SP will also need enhancement. I am sure there is more to it which you can have team check.

On a side note, for future, when we select L1 in from and to, L2 look up should only show relevant L2s. Currently it shows all L2s.