Fixed Price Billing
Reference Guide
Version 24.x
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Overview and Summary

M5 allows billing a fixed price for a job performed on a work order. Previously, M5 could only bill a labor estimate if configured to do so using Billing Codes and the rate would be calculated based on the estimated hours of labor. Now, the client can charge a fixed price by job or continue to bill labor estimates as it was previously. Several frame changes have been made to accommodate this modification:

- Standard Job Tech Spec – Estimated cost field added.

- Work Request Main – Estimated cost field added.

- Billing Code Maintenance – Options to select bill fixed costs.

- Unit/Dept Billing Code Maintenance – Options to select bill fixed costs.

The **When to bill estimates** field on the Billing Codes and Unit/Dept Billing Codes controls the fixed billing functionality. The options are:

1. Always bill estimate - All jobs are billed at the total estimated cost, even if that estimate is zero, and even if no actual charges are made to the job. Jobs not flagged as fixed bids are not billed at all.

2. Always bill estimate unless zero - All jobs are billed at the total estimated cost unless that estimate is zero, in which case they are billed according to the usual labor/part/commercial settings.

3. Bill estimate if job set to do so - Jobs flagged as fixed-price jobs are billed at the total estimated cost, even if that estimate is zero, and even if no actual charges are made to the job. Jobs not flagged as fixed bids are billed according to the usual labor/part/commercial settings.

4. Bill estimate if job set to do so, unless zero - Jobs flagged as fixed-price jobs are billed at the total estimated cost. Jobs not flagged as fixed bids, or whose estimate is zero, are billed according to the usual labor/part/commercial settings.

5. Disallow billing of estimates - All jobs are billed according to the usual labor/part/commercial settings. This is the default for new billing codes.
Because the total estimated cost is a summary of labor, part, and commercial charges, it is not possible to apply the costs to the usual billing items.

As a result, the billing item for fixed bids must be selected in advance. A billing item called TOTAL CHGS gets applied as the default to every billing code. The user can change this to any billing item.

For parts and commercial charges, the user can pick Do not bill, Bill Actuals, No Markup, or Bill Actuals, With Markup. For labor the user still has the option to bill labor estimates if they wish to do so and the choices in addition to Bill Actuals, No Markup and Bill Actuals are Bill estimates or Bill estimates unless zero.

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.