

WAND SUPPLIER INSTRUCTIONS Project Billing Submittal

From the WAND Home Page, click on the **Billing** tab.

The screenshot shows the WAND Home Page navigation menu. The 'Billing' tab is highlighted with a red box. The menu includes: Home, Client, Worker, Requisition, Billing, Invoicing, and Reporting. The date 'Monday May 05, 2014' is displayed below the menu. In the top right corner, there are links for 'MY ACCOUNT', 'ONLINE HELP', 'CONTACT US', and 'LOG OUT'. A 'Switch Roles' dropdown menu is set to 'Standard'. Below the navigation menu, there is a 'View:' section with a dropdown menu set to 'New Requisitions' and an 'Action Items' section showing 'Pending Billing' and 'Pending Interviews' with a count of 0.

Click on **Add New**.

The screenshot shows the WAND Billing page. The 'Billing' tab is highlighted with a red box. Below the navigation menu, there are links for 'Search', 'List All', 'Add New', 'Export Billing', and 'Confirm Expenses'. The 'Add New' button is highlighted with a red box. Below the navigation menu, there is a 'Search for Billing' section with various search criteria: Client (dropdown), Supplier Inv# (text), Worker (text), Earnings E/D (text with calendar icon), Date Created (text with calendar icon), Type (dropdown with options: Adjustment, Benefit, Time, Expense, Project), Req# (text), Line# (text), Inv# (text), and Status (dropdown with options: Saved, Pending, Rejected, Processed). There are 'Search' and 'Advanced Search' buttons.

Select the **Resource Type** (Suppliers or Worker). If supplier is selected, all available suppliers will list below. To select a displayed supplier, click on the supplier's name. You may also search by Requisition number by entering the Req # and clicking **Search**.

PROUnlimited WAND™

→ MY ACCOUNT → ONLINE HELP → CONTACT US → LOG OUT

Switch Roles Standard

Home Client Worker Requisition Billing Invoicing Reporting

Search | List All | Add New | Export Billing | Confirm Expenses

Add New Billing : Search

Resource Type: Please select one
Please select one
Suppliers
Worker

Req#:

Cancel Clear Search Search

Click on **Select** next to the correct Requisition.

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→ MY ACCOUNT → ONLINE HELP → CONTACT US → LOG OUT

Switch Roles Standard

Home Client Worker Requisition Billing Invoicing Reporting

Search | List All | Add New | Export Billing | Confirm Expenses

Add New Billing : Requisition Selection

Req#	Date Start	Type	Status	Client	Resource	Title	Location	
3859301-3870565	01/01/2014	PROJECT	Filled			Annual Professional Services Prepayment	US,VA	Select ⓘ
3859203-3870567	01/01/2014	PROJECT	Filled			Annual Professional Services Prepayment	US,VA	Select ⓘ

Cancel

Select the **Billing Type** (Project). Click **Submit**.

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→ MY ACCOUNT → ONLINE HELP → CONTACT US → LOG OUT

Switch Roles Standard

Home Client Worker Requisition Billing Invoicing Reporting

Search | List All | Add New | Export Billing | Confirm Expenses

Req#: 3870565 Client: : Manager Start Date: 01/01/2014
Type: Project Dept: : Supplier End Date: 12/31/2014
Status: Filled Worker.

Add New Billing : Parameters

Billing Type: Please select one
Please select one
Project

Submit Cancel

You will be able to enter invoicing based on **Positions, Materials, and/or Milestones**.

- Position-based billing:** Billing based on one or more positions
- Material-based billing:** Billing based on a flat unit price for material costs
- Milestone-based billing:** Billing based on a flat rate for the project deliverable

These parameters are determined during the initial setup of the project requisition.

For example: If the contracting manager originally determines that payment for the project will be processed based on milestones, then when you submit the invoice in WAND, you will only have the option of invoicing based on milestones. If you find that you need to invoice based on a parameter other than what is available to you in WAND, please contact your PRO representative.

If you have an Internal Reference number that you would like to use for this billing item to assist with payment reconciliation you can enter it in the **Internal Supplier Reference** field. Hover your mouse over the Help Text icon (?) to get help on what the field means. Note that this field will be available on the Supplier Payment Invoice report.

Next, enter the **Date** and any **Notes** in regards to the Milestone, Materials, or Position-based billing you are entering. You can also add an **Attachment** by click on the red **Attachments** link.

When complete, click on **Add New** under the section you would like to add billing for (Milestone, Position, or Materials).

Please Note: This screenshot example shows both Milestone and Position billing options. What you see when submitting a project billing will depend on how the project was setup.

The screenshot displays the WAND system interface. At the top, there are navigation links: MY ACCOUNT, ONLINE HELP, CONTACT US, and LOG OUT. Below these is the WAND logo and a 'Switch Roles' dropdown menu set to 'Standard'. A breadcrumb trail shows: Home > Client > Worker > Requisition > Billing > Invoicing > Reporting. Below the breadcrumb is a search bar and links for 'List All', 'Add New', 'Export Billing', and 'Confirm Expenses'. The main form area shows 'Req#: 3907683', 'Client:', and 'Supplier:'. A red box highlights the 'Internal Supplier Reference' field with a help icon (?) and the value '1234567'. Below this are two sections: 'Milestone Detail List' and 'Position Detail List'. Each section has a table with columns for 'Date', 'Notes', and 'Status'. The 'Date' field is set to '04/07/2014'. The 'Notes' field contains the text 'Enter Milestone Billing Notes Here if Applicable' (for Milestones) or 'Enter Position Billing Notes Here if Applicable' (for Positions). A red box highlights the 'Add New' button at the bottom right of each section. At the bottom of the page, there is an 'Attachments:' section and a 'Cancel' button.

Once you've clicked on **Add New**, you will now see the screen below. You will start by adding your **Milestone** information. WAND will show you the remaining dollar balance for **Milestones** for this Project. You will enter the billing amount for this particular Milestone in the **Amount** field.

Next, you will enter any **Expense, Tax** or **Custom Fields** applicable to this Milestone billing by clicking on the red **Add New** hyperlink on the right in each section.

The screenshot displays the WAND software interface for a project with Requisition # 3907683. The 'Billing' section is active, showing a 'Milestone Detail List' with one entry for 04/07/2014 with a 'Pending' status. Below this is a 'Milestones' table with one row for 'Milestone #01' with an amount of 1500.00 and a balance of \$133500.00. The 'Expense' and 'Tax' sections are currently empty, each with a red-bordered 'Add New' button. The 'Position Detail List' section is also empty. At the bottom, there are 'Save' and 'Cancel' buttons.

Date	Notes	Status
04/07/2014	Enter Milestone Billing Notes Here if Applicable	Pending

Milestones	Comments	Amount	Balance Amt	Delete
Milestone #01	Milestone Comments	1500.00	\$ 133500.00	

Expense Category	Description	Amount	Balance Amt
Total: \$ 0			

Taxes	Percentage	Amount
Total: \$ 0		

Date	Notes	Status
04/07/2014	Enter Position Billing Notes Here if Applicable	

After clicking the **Add New** red hyperlink for the sections you need, you will see below that it has expanded the section allowing you to now enter your **Expense**, or **Tax** information.

Enter the billing information for the sections selected. Click on the **Add New** red hyperlink again in each section to add an additional **Expense**, or **Tax**.

When you are finished, click on the Save button at the bottom of the page.

Note: Some clients have Custom Field options.

Home > Client > Worker > Requisition > Billing > Invoicing > Reporting

Search | List All | **Add New** | Export Billing | Confirm Expenses

Req#: 3907683 Client: Supplier:

Internal Supplier Reference: 1234567

Milestone Detail List

Date	Notes	Status
04/07/2014	Enter Milestone Billing Notes Here if Applicable	Pending

Milestones

Milestones	Comments	Amount	Balance Amt	
Milestone #01	Milestone Comments	1500.0	\$ 133500.00	Delete

Expense

Expense Category	Description	Amount	Balance Amt	
Please select one	Expense Description	350.00	\$ 133,500.00	Delete
Total: \$ 0				Add New

Taxes

Taxes	Percentage	Amount	
Sales Tax	8.50	127.50	Delete
Total: \$ 127.5			Add New

Add New

Position Detail List

Date	Notes	Status
04/07/2014	Enter Position Billing Notes Here if Applicable	

Add New

Attachments

Attachments:

Save Cancel

To add **Position Details**, scroll down to the **Position Details List** section, enter the date and any notes, then click on **Add New**:

Home > Client > Worker > Requisition > **Billing** > Invoicing > Reporting

Search | List All | **Add New** | Export Billing | Confirm Expenses

Req#: 3907683 Client: Supplier:

Internal Supplier Reference: ? 1234567

Milestone Detail List

Date	Notes	Status
04/07/2014	Enter Milestone Billing Notes Here if Applicable	Pending

Milestones

Milestones	Comments	Amount	Balance Amt
Milestone #01	Milestone Comments	1500.0	\$ 133500.00 Delete

Expense

Expense Category	Description	Amount	Balance Amt
Please select one	Expense Description	350.00	\$ 133,500.00 Delete
Total: \$ 0			Add New

Taxes

Taxes	Percentage	Amount
Sales Tax	8.50	127.50
Total: \$ 127.5		Delete Add New

[Add New](#)

Position Detail List

Date	Notes	Status
04/07/2014	Enter Position Billing Notes Here if Applicable	

[Add New](#)

Attachments

Attachments:

[Save](#) [Cancel](#)

Position Billing:

1. Select the appropriate **Position** from the drop down list.
2. Select the **Worker** associated if applicable. **Note:** This is an optional field.
3. Enter any **Comments** related to this position.
4. **Bill Rate UOM** (unit of measure) will show how this project is setup either by Hourly, Daily, or Weekly bill rate.
5. **Bill Rate** shows the rate per unit of measure setup for this position.
6. **Est # of Units** shows how many units were estimated for this position.
7. Enter the number of **Units Worked** (Hours, Days, or Weeks). In this example the Units Worked are by hour.
8. Tab over to the **Amount** field and the dollar amount will automatically populate based on the unit of measure, bill rate, and units worked.
9. The **Balance Units** and **Balance Amt** fields will also automatically update based on remaining **Est # of Units** and **Amount**.
10. You may also enter any Expenses for the position and/or position worker combination under the **Expense** section. Click on the Add New red hyperlink to add multiple expenses.
11. To add another position or another worker under the same position, click on the **Add New** button at the bottom.
12. When finished click on the **Save** button at the bottom of the page.

The screenshot shows a web form for Position Billing. It is divided into several sections: Positions, Expense, and Attachments. Numbered callouts (1-12) point to specific fields and buttons. The Positions section includes dropdowns for Position (QA Resource 1) and Worker (Chava, Madhu), a text area for Comments, and a table for billing details. The Expense section has a table with columns for Expense Category, Description, Amount, and Balance Amt, and a Total row showing \$ 4000.00. The Attachments section is currently empty. At the bottom, there are Save and Cancel buttons.

Positions	Worker	Comments
QA Resource 1	Chava, Madhu	Enter Comments Here

Bill Rate UOM	Bill Rate	Est# of Units	Units Worked	Amount	Balance Units	Balance Amt
Hourly	\$ 100.00	160.00	40	4000.00	80.00	8000.00

Expense Category	Description	Amount	Balance Amt
		Total:	\$ 4000.00

Buttons: Add New, Add New, Save, Cancel

Once you have Saved your billing information, you will see the screen below. At the top it will have a **Billing Line #** assigned to each item you entered (i.e. **Milestone, Expense**).

When you are finished, simply click on the **Done** button at the bottom of the page. Your billing items have been submitted for processing.

Search List All Add New Export Billing Confirm Expenses					
Req#: 3907683	Client: NIKE, Inc.	Supplier: Cognizant Technology Solutions US Corporation (22422)			
Billing Item					
The Billing Item has been successfully submitted.					
Line#: 278455093 , 278455096					
Submission List : Milestones					
Date	Notes	Internal Supplier Reference	Status	Notes	Status
04/07/2014	Enter Milestone Billing Notes Here if Applicable	1234567			Processed
Detail #	Milestones	Comments	Amount	Balance Amt	Pay Supplier
75867925	Milestone #01	Milestone Comments	\$ 1,500.00	\$ 133,022.50	\$ 1,485.00
					Total: \$ 1,500.00
Taxes		Percentage	Amount		
SALES_TAX		8.50%	\$ 127.50		
					Total Milestone: \$ 1,627.50
			Total Milestone:	\$ 1,627.50	
			Total Material:	\$ 0.00	
			Total Position:	\$ 0.00	
Project Expense Submission					
Milestone Expense Detail List					
Milestones					
Milestone #01					
Expense Info					
Detail	Expense Category	Description	Amount	Balance Amt	Status
75867926	Lodging	Expense Description	\$ 350.00	\$ 133,022.50	Processed
					Total: \$ 350.00
Earnings E/D					
Earnings E/D: 04/13/2014					
Attachments					
Attachments					
Attachments					
					Done