



Menu

Company: 25 - Veregy Pacific, LLC

Search

Veregy Pacific, LLC

My Tasks

- > Accounts Payable
- > Accounts Receivable
- > Business Intelligence
- > Cash Management
- > Document Management
- > Equipment Management
- > General Ledger
- > Headquarters
- > Human Resources
- > Imports
- ▼ Job Billing
 - Programs
 - Reports
- > Job Cost
- > Payroll
- > Pre-Construction
- > Project Management
- > Purchase Order
- > Reports
- > Service Management
- > Subcontract Ledger
- > User Database
- > Viewpoint Administration

- JB Batch Process
- JB Bill Groups
- JB Bill Initialization
- JB Contract Info
- JB Processing Group
- JB Progress Billing
- JB Release Retainage
- JB T&M Bill Edit

3 - Click "JB Progress Billing"

1 - Click "Job Billing"

2 - Click "Job Programs"

2 - Click on Grid to find the projects

1 - Click the arrow up to put it in the correct billing month. (this is last months billing so 7/25 is correct)

JB Progress Billing for Veregy Pacific, LLC

File Edit Records View Options Tools Windows Help

Bill Month: 07/25 Bill Number: 5 JB App #1

DES Progress Invoice DEL Progress Invoice No Logo Progress Invoice

App for Payment NPE AIA Report Check Ready to Bill Check Skip Billing Check Bill Sent Sworn Statement IN Veregy Progress Bill Veregy Progress Invoice (TM)

Bill Items Info

Grid Info Items Item SM/Tax Reviewers Recipients Delivery Notes

Invoice: 072505 Invoice Date: 7/10/25

Contract: 51-25-003 San Marcos EnergyTracer - Year 2 Pay Terms: N30 Net 30 Days

Customer: 50284 San Marcos USD Due Date: 8/9/25

Application #: 1 Discount Date: Ready to Bill Bill Sent

Invoice Desc: JB App #1 From Date: 7/1/24 Skip Billing

Status: I-Interfaced To Date: 6/30/25

Process Group: T Kennard Trey Kennard

Receivable Type: 1

Bill Address Info

Address: 255 Pico Ave, STE 250

City: San Marco State: CA

Zip Code: 92069 Country:

Add'l Address:

Bill Status Tracking:

JB Reviewer Group:

Date Created: 7/10/25

Created By: VIEWPOINT\JLJohnson.YZE7

User ID: Date:

Ready For Review

Draft Approved

Sent to Customers

Approved for Billing

Restrict by Item Bill Group

Item Bill Group:

Change Orders Retainage Totals To JB Interface

Posting Notes:

Per Julie Johnson this is for Service

Bill month of invoices to review/edit.

Outbox: 0 Waiting Result 1 of 70 View Co#: 25

Click "Progress Group" (2) times to alphabetize and start from the Z-A

25 JB Progress Billing for Veregy Pacific, LLC

FileEditRecordsViewOptionsToolsWindowsHelp

1 - Click the job in the "Grid" column

2. Click on "Items"

His will be on top now

25 JB Progress Billing for Veregy Pacific, LLC

File Edit Records View Options Tools Windows Help

Bill Month: 07/25 Bill Number: 6 JB App #2

DES Progress Invoice DEL Progress Invoice No Logo Progress Invoice

App for Payment NPE AIA Report Check Ready to Bill Check Skip Billing Check Bill Sent Sworn Statement IN Veregy Progress Bill Veregy Progress Invoice (TM)

Bill Items Info

Grid	Info	Items	Item SM/Tax	Reviewers	Recipients	Delivery	Notes								
Bill Month	Bill Number	Invoice	Contract	Contract Desc	Customer	Name	Application #	Invoice Description	Invoice Status	Process Group	ProcessGroup Desc	Posting Notes	Ready to Bill	Skip Billing	Bill Sent
07/25	6	0725-0006	21-24-002	FLUNA Beloit CIP RCx Ph II	50062	Pepsico	2	JB App #2	A-Active	T Trey	Trey Thomas Billings	Trey - Bill the tax on the contingency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	88	0725-0088	21-21-005	Pepsico - Frito Orlando CIP Automation	50062	Pepsico	15	JB App #15	A-Active	T Trey	Trey Thomas Billings		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	89	0725-0089	21-21-019	DFA COI North	50027	Dairy Farmers of America, Inc	60	JB App #60	A-Active	T Trey	Trey Thomas Billings	DFA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	90	0725-0090	21-21-019	DFA COI North	50027	Dairy Farmers of America, Inc	61	JB App #61	A-Active	T Trey	Trey Thomas Billings	CEC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	91	0725-0091	21-21-020	DFA COI South	50027	Dairy Farmers of America, Inc	63	JB App #63	A-Active	T Trey	Trey Thomas Billings	DFA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	92	0725-0092	21-21-020	DFA COI South	50027	Dairy Farmers of America, Inc	64	JB App #64	A-Active	T Trey	Trey Thomas Billings	CEC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	93	0725-0093	21-21-021	DFA Riverside	50027	Dairy Farmers of America, Inc	60	JB App #60	A-Active	T Trey	Trey Thomas Billings	DFA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	94	0725-0094	21-21-021	DFA Riverside	50027	Dairy Farmers of America, Inc	61	JB App #61	A-Active	T Trey	Trey Thomas Billings	CEC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	95	0725-0095	21-21-022	DFA Santa Ana	50027	Dairy Farmers of America, Inc	63	JB App #63	A-Active	T Trey	Trey Thomas Billings	DFA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	96	0725-0096	21-21-022	DFA Santa Ana	50027	Dairy Farmers of America, Inc	64	JB App #64	A-Active	T Trey	Trey Thomas Billings	CEC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	97	0725-0097	21-21-023	DFA Turlock	50027	Dairy Farmers of America, Inc	64	JB App #64	A-Active	T Trey	Trey Thomas Billings	DFA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	98	0725-0098	21-21-023	DFA Turlock	50027	Dairy Farmers of America, Inc	65	JB App #65	A-Active	T Trey	Trey Thomas Billings	CEC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	99	0725-0099	21-21-035	Pepsico - Frito Irving CIP Automation	50062	Pepsico	11	JB App #11	A-Active	T Trey	Trey Thomas Billings		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	100	0725-0100	21-22-071	Cedars-Sinai Fuel Tank Controls Upgrade	50218	Cedars-Sinai Hospital	9	JB App #9	A-Active	T Trey	Trey Thomas Billings		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	101	0725-0101	21-23-216	Casa Grande CIP Site Visit	50062	Pepsico	3	JB App #3	A-Active	T Trey	Trey Thomas Billings		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	226	0725-0226	25-24-002	Pepsico - Frito RC CIP RCx PhII	50062	Pepsico	6	JB App #6	A-Active	T Trey	Trey Thomas Billings		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	227	0725-0227	65-22-101	Denver CIP RCx	50062	Pepsico	4	JB App #4	A-Active	T Trey	Trey Thomas Billings		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	5	072505	51-25-003	San Marcos EnergyTracer - Year 2	50284	San Marcos USD	1	JB App #1	I-Interfaced	T Kennard	Trey Kennard	Per Julie Johnson this is for Service	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	194	0725-0194	65-21-137	TEC - CC-LEAP	50081	The Energy Coalition	59	JB App #59	I-Interfaced	S Murphy	Sean Murphy Billings	\$1,285.00 ready to bill - Sean to submit custom invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	195	0725-0195	65-21-145	TEC - City of Redondo Beach	50081	The Energy Coalition	28	JB App #28	I-Interfaced	S Murphy	Sean Murphy Billings	\$1,035.00 ready to bill - Sean to submit custom invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	198	0725-0198	65-22-021	TEC - Redondo Beach USD	50081	The Energy Coalition	4	JB App #4	I-Interfaced	S Murphy	Sean Murphy Billings	\$8,667.50 ready to bill - Sean to submit custom invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	208	0725-0208	65-23-208	TEC - City of Moorpark	50081	The Energy Coalition	4	JB App #4	I-Interfaced	S Murphy	Sean Murphy Billings	\$420.00 ready to bill - Sean to submit custom invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	211	0725-0211	65-24-023	Alhambra USD - Scanlon EEC Cx	50003	Alhambra Unified School District	13	JB App #13	I-Interfaced	S Murphy	Sean Murphy Billings	\$1,440.25 ready to bill - Sean to email invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	215	0725-0215	65-24-032	TEC - Los Angeles USD	50081	The Energy Coalition	5	JB App #5	I-Interfaced	S Murphy	Sean Murphy Billings	\$645.00 ready to bill - Sean to submit custom invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	216	0725-0216	65-24-036	TEC - Los Angeles County	50081	The Energy Coalition	11	JB App #11	I-Interfaced	S Murphy	Sean Murphy Billings	\$5,825.00 ready to bill - Sean to submit custom invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	218	0725-0218	65-24-045	TEC - ERAP Audits	50081	The Energy Coalition	7	JB App #7	I-Interfaced	S Murphy	Sean Murphy Billings	\$4,752.50 ready to bill - Sean to submit custom invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	220														

Bill month of invoices to review/edit.

Outbox: 0 Waiting Result 1 of 70 Grid Co#: 25

3 - Click "Info"

2 - Enter % complete
here and amount will
auto populate

1 - Enter amount to
bill here or (see #2)

25 JB Progress Billing for Veregy Pacific, LLC

File Edit Records View Options Tools Windows Help

Bill Month: 07/25 Bill Number: 6 JB App #2

DES Progress Invoice DEL Progress Invoice No Log Progress Invoice

App for Payment NPE AIA Report Check Ready to Bill Check Skip Billing Check Bill Sent Sworn Statement IN Veregy Progress Bill Veregy Progress Invoice (TM)

Bill Items Info

Grid	Info	Items	Item SM/Tax	Reviewers	Recipients	Delivery	Notes						
Item	01	Bill Group	Bill Group Desc	Description	UM	Contract Amount	Previous Amount	% Complete	This Bill WC Amount	To Date Amount	Retainage %	Retainage	Exclude From Invoice
	01	01	FLNA Beloit CIP RCx Ph II	FLNA Beloit CIP RCx Ph II	LS	118,054.49	93,411.02	79.13 %	0.00	93,411.02	0.00 %	0.00	<input type="checkbox"/>
	02	01	FLNA Beloit CIP RCx Ph II	L1/ Beloit CIP Automation Upgrade	LS	96,216.00	0.00	0.00 %	0.00	0.00	0.00 %	0.00	<input type="checkbox"/>
*													<input checked="" type="checkbox"/>

** You can do either #1 or #2 but not both for the same line item

Last Step - Once you click to Ready to bill of skip billing, then click "Grid" and start on page 4 again till all projects are completed

Click "Ready to Bill" once billing is entered

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File Edit Records View Options Tools Windows Help

Bill Month: 07/25 Bill Number: 6 JB App #2

DES Progress Invoice DEL Progress Invoice No Logo Progress Invoice

App for Payment NPE AIA Report Check Ready to Bill Check Skip Billing Check Bill Sent Sworn Statement IN Veregy Progress Bill Veregy Progress Invoice (TM)

Billing Info

Grid Info Items Item SM/Tax Reviewers Recipients Delivery Notes

Invoice: 0725-0006 Invoice Date: 7/15/25

Contract: 21-24-002 FLNA Beloit CIP RCx Ph II Pay Terms: N30 Net 30 Days

Customer: 50062 Pepsico Due Date: 8/14/25

Application #: 2 Discount Date: Ready to Bill Bill Sent

Invoice Desc: JB App #2 From Date: 7/1/25 Skip Billing

Status: A-Active To Date: 7/31/25

Process Group: T Trey Trey Thomas Billings

Receivable Type: 1

Bill Address Info

Address: NASS PAYABLES PO BOX 1800

City: Winston Salem State: MA

Zip Code: 27105 Country: US

Add'l Address:

Bill Status Tracking:

JB Reviewer Group:

Date Created: 7/15/25

Created By: VIEWPOINT\SBeal.YZE7

User ID: Date:

Ready For Review

Draft Approved

Sent to Customers

Approved for Billing

Change Orders Retainage Totals To JB Interface

Posting Notes:

Trey - Bill the tax on the contingency

Enter notes as needed (Most of the time its not needed, its internal notes)

Only click "Skip Billing" if you did not enter an amount to bill that month