Milestone Billing & WIP Report

User Guide

Odoo 18 / 19 · Community Edition

Projects & Services

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1. Overview

Milestone Billing & WIP Report lets you bill projects on agreed milestones and gives you a live WIP (work-in-progress) / unbilled-revenue report. Define milestones on a project, mark them reached, generate the invoices, and see at any moment how much value has been delivered but not yet billed.

A revenue-accrual model ties the WIP figure into the general ledger, supporting FRS-102-style contract accounting for UK services businesses.

Who is it for?

Project-based and professional-services firms that invoice in stages and need visibility of unbilled work and accrued revenue.

Technical name	gb_milestone_billing_wip_report
Category	Projects & Services
Depends on	project, sale_management, account
Edition	Odoo 18 / 19 Community (no Enterprise required)
Licence	LGPL-3

2. Installation

The module installs like any standard Odoo application. You need a user with the Administration / Settings access right to add an app.

- Activate Developer Mode (Settings ▸ General Settings ▸ Developer Tools) if the Apps menu is hidden.
- Open Apps and click Update Apps List so Odoo re-scans the add-ons path.
- Search for “Milestone Billing & WIP Report” (technical name **gb_milestone_billing_wip_report**).
- Click Install. Odoo loads the models, security groups, menus and any scheduled actions.
- Refresh the browser; the new top-level menu Milestone Billing appears.

Dependencies

This app depends on project, sale_management, account. Odoo installs any missing dependency automatically.

3. Configuration

Milestones are defined per project and linked to sales/invoicing.

Milestones — Milestone Billing ▸ Milestones

Create billing milestones (project.milestone.billing) on a project with an amount and a target/reached date. Each carries a Draft → Reached → Invoiced state.

Accrual basis

WIP accruals (project.wip.accrual) can be posted to recognise revenue as work is delivered, with Draft → Posted states and reversal support.

Invoicing link

Reached milestones are turned into customer invoices via the standard account integration.

4. Step-by-step Usage Walkthrough

Bill as milestones are reached; the WIP report keeps unbilled value visible.

Step	What you do
1. Add milestones	Open the project's Milestones and add each billing stage with its amount and target date.
2. Mark reached	When a stage is delivered press Mark Reached (action_mark_reached); the milestone becomes Reached.
3. Generate invoices	Use Generate Invoices (action_generate) or Create Invoice on a milestone to raise the customer invoice; the milestone becomes Invoiced.
4. View invoice	Use View Move (action_view_move) to open the posted invoice.
5. Post accrual	Post a WIP accrual (action_post) to recognise delivered-but-unbilled revenue; Reverse it later if needed.
6. WIP report	Open WIP / Unbilled Report to see delivered value, billed value and the unbilled balance per project.

Status lifecycle

Milestone: Draft → Reached → Invoiced (Cancelled possible). Accrual: Draft → Posted (reversible).

5. Feature Reference

Project milestones

Billing milestones per project with amount, date and a Draft → Reached → Invoiced lifecycle.

Invoice generation

Turn reached milestones into customer invoices individually or in bulk.

WIP / unbilled report

A live report (project.wip.report) of delivered, billed and unbilled value per project.

Revenue accruals

WIP accrual entries (project.wip.accrual) posted to the ledger, with reversal, to recognise revenue as earned.

Accounting tie-in

Built on project, sale_management and account so milestones flow into standard Odoo invoicing.

6. Tips, Troubleshooting & FAQ

Q. How do I bill only part of a project?

A. Define a milestone for that stage, mark it reached and generate its invoice; the rest stays unbilled.

Q. What does the WIP report show?

A. For each project, the value delivered, the value already billed and the unbilled balance (work in progress).

Q. What is a revenue accrual for?

A. It recognises revenue you have earned but not yet invoiced, supporting FRS-102-style contract accounting.

Q. Can I reverse an accrual?

A. Yes. Posted accruals can be reversed if the estimate changes or the work is later invoiced.

Q. Does it create real invoices?

A. Yes. Generating from a reached milestone creates a standard account.move customer invoice.

Q. Which apps must be installed?

A. project, sale_management and account; Odoo installs them automatically as dependencies.

7. Support

We provide application support and integration guidance for this module. If you hit an issue, please include your Odoo version (18 or 19), the module version, and a short description with a screenshot.

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Thank you for choosing Milestone Billing & WIP Report. This guide documents the features as implemented in the module; menu labels and field names match what you see in Odoo.