

Understanding Invoice Line Item Grouping

When you [create an invoice from time entries](#), the final step asks how the entries should be grouped into line items. The grouping strategy you choose determines how many line items appear on the invoice, what each line item is called, and how the amounts are displayed.

This article explains each grouping strategy in detail, how rates are resolved for each entry, and how InvoUp prevents the same time entry from being invoiced twice.

The Four Grouping Strategies

Strategy	Line Items Created	Best For
Single Line Item	1	Clients who want a simple, single-total invoice
By Project	1 per project	Clients with multiple projects who need to see costs separated by engagement
By Service	1 per service	Firms that bill by activity type (e.g., research, consulting, design)
By Member	1 per team member	Teams where clients want to see individual contributions

Single Line Item

All selected time entries are combined into a single line item. This produces the simplest invoice — one line with the total hours and amount.

Example line item name: Website Redesign, Brand Strategy (Mar 1 – Mar 31, 2026)

The name is built from a comma-separated list of the project names involved, followed by the date range of the entries in parentheses. If only one date is covered, just that date is shown (e.g., Website Redesign (Mar 15, 2026)).

By Project

One line item is created for each project that has time entries in the selection. If you selected entries across three projects, you get three line items.

Example line item names:

- Website Redesign
- Brand Strategy
- Annual Audit

By Service

One line item is created for each service attached to the selected time entries. Entries that have no service assigned are grouped together under "**No Service**".

Example line item names:

- Consulting
- Design
- No Service

By Member

One line item is created for each team member who logged the selected time entries.

Example line item names:

- Jane Smith
- Alex Chen

“ All line item names are automatically truncated to 100 characters. If a name exceeds this limit (most likely with the Single strategy when many projects are involved), it is trimmed and ends with "...".

How Line Item Amounts Are Calculated

For each group of entries, Invup checks whether every entry in that group has the same hourly rate. The result determines how the line item's quantity and unit price are displayed.

Same-Rate Groups

When all entries in a group share the same rate, the line item is displayed in a **hours x rate** format:

- **Quantity** = total hours across all entries in the group
- **Unit price** = the shared hourly rate

Example: A group of entries totaling 12.5 hours, all at \$150/hr:

Line Item	Qty	Unit Price	Amount
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Website Redesign	12.5	\$150.00	\$1,875.00
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This format gives your client a clear picture of how many hours were worked and at what rate.

Mixed-Rate Groups

When entries in a group have different hourly rates — for example, because different team members have different rates, or because rates changed during the billing period — the line item is displayed as a **flat amount**:

- **Quantity** = 1
- **Unit price** = the pre-calculated total (each entry's hours multiplied by its rate, then summed)

Example: A group with 8 hours at \$150/hr and 4 hours at \$200/hr:

Line Item	Qty	Unit Price	Amount
Website Redesign	1	\$2,000.00	\$2,000.00

Invup uses this format because displaying a single rate would be misleading when the group contains entries at different rates. The total is calculated precisely for each entry and summed, so the amount is always accurate.

“ You can always edit a line item's name, quantity, or unit price on the invoice detail page after the invoice is created.

How Rates Are Resolved

When building line items, Invup determines the hourly rate for each time entry using this order:

1. **Locked rate** — If the entry already has a locked rate (from a previous rate lock event), that rate is used as-is.
2. **Rate hierarchy** — If no locked rate exists, Invup resolves the rate dynamically by walking the [rate hierarchy](#). This checks multiple levels — from the most specific (e.g., a project-service-member rate) to the most general (e.g., the team member's base rate) — and uses the first rate it finds.
3. **\$0.00 fallback** — If no rate is configured at any level in the hierarchy, the entry is valued at \$0.00. This can happen if a team member has no rate set anywhere.

This means the amounts on your invoice reflect the most accurate rate available at the time of invoice creation. If you've set up your [rate hierarchy](#) correctly, every entry will have a meaningful rate.

“ Entries logged against a **non-billable service** always resolve to \$0.00 regardless of other rate settings. If you have **Billable entries only** enabled in the wizard filters (the default), these entries are excluded entirely.

At-Invoice Rate Locking

If your organization's [rate lock policy](#) is set to **At Invoice**, creating an invoice from time entries triggers rate locking on all included entries that don't already have a locked rate.

Here's what happens:

1. Invup resolves the current rate for each entry using the rate hierarchy.
2. That rate is frozen on the entry as its **locked rate**, along with a record of which level of the hierarchy provided it (the **locked rate source**).
3. From this point forward, the entry's rate is fixed — even if you later change rates on the project, service, or team member.

Entries that already had a locked rate (e.g., from the "At Creation" policy or a previous invoice) are left unchanged.

This ensures the amount on your invoice matches the rate that was in effect when you generated it. Without rate locking, a rate change after invoicing could cause a mismatch between what was billed and what the time entry shows in reports.

For a full explanation of rate lock policies, see [Rate Locking](#).

How Double-Billing Is Prevented

When you create an invoice from time entries, each time entry is linked to the invoice line item it belongs to. This link is permanent and serves two purposes:

1. **Traceability** — You can always see which time entries make up a given invoice line item and, conversely, which invoice a time entry was billed on.
2. **Double-billing prevention** — The invoice creation wizard has an **Exclude already invoiced entries** filter, which is enabled by default. When active, any time entry that is already linked to an invoice line item is automatically excluded from the wizard results.

This means that under normal use, a time entry can only appear on one invoice. You don't need to manually track which entries have been billed — Invup handles it automatically.

If you do need to include previously invoiced entries (for example, to re-invoice work after voiding an earlier invoice), you can disable the **Exclude already invoiced entries** toggle in the filter step. Use this with care, as it can result in the same work appearing on multiple invoices.
