



### MEETINGS & CONVERSATIONS LOG

Date	Participants	Format	Topic / Agenda	Outcome / Next Steps

† Format: In-Person · Phone Call · Video Call · Email · Text/Chat · Site Walk

### REIMBURSABLE EXPENSES

Date	Category	Description	Amount \$

‡ Category: Mileage/Travel · Meals & Entertainment · Supplies/Materials · Printing · Software/Tools · Parking/Tolls · Other

Total Expenses (USD)
Tax / Other (if any)
<b>TOTAL DUE (USD)</b>

#### QBO Entry Notes

- Bill Date = Invoice Date above

### Engagement Summary & Deliverables — Page 3

Complete all fields. Copy the Overall Summary into the QuickBooks Online bill Memo field.

#### ■ OVERALL ENGAGEMENT SUMMARY (copy into QuickBooks bill Memo)

#### ■ KEY OBSERVATIONS & FINDINGS

#### ■ RECOMMENDATIONS & ACTION ITEMS (include priority: High / Med / Low and timeline)

#### ■ DELIVERABLES SUBMITTED THIS PERIOD

#### ■ NEXT STEPS & PLANNED WORK

Consultant Signature

Authorized by (Manager / GM)

Date: \_\_\_\_\_

Date: \_\_\_\_\_

#### ■ SUBMISSION INSTRUCTIONS

1. Complete all fields on all pages. Save a copy as PDF: Inv-[YourName]-[InvoiceNum].pdf
2. Email to: invoices@oonce.com  
Subject line: "Consultant Invoice [Your Name] [Invoice #]"
3. Management will create a Bill in QuickBooks Online using the QBO fields on page 1.