

# CONTRACT

## INVOICES

The Invoices tile in the Contract Listing screen allows you to create a manual Contract Invoice, to bill a machine on a contract, for either fees, meters, or both, within the current billing period. This will prevent a contract invoice from being raised at month end for the contract (fees and / or meters).

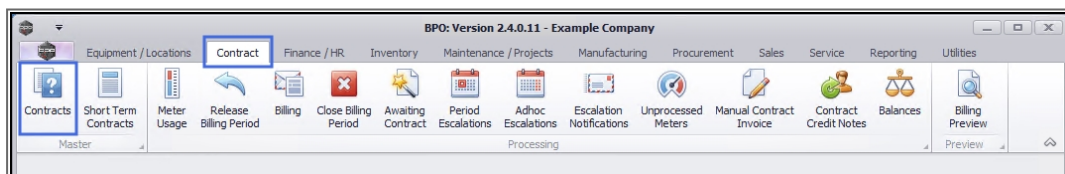
It is important to note, that **Manual Contract Invoices should only be used to fix a problem as a last resort.**

This manual provides a brief outline of the process from the Invoices tile in the Contract Listing screen. For a more thorough explanation, refer to [Create a Manual Contract Invoice, Billing](#) and [Short Term Contract Invoice](#).

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**Ribbon Access:** *Contract > Contracts*

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1. The **Contract Listing** screen will be displayed.
2. Select the **Site** that you wish to work in.

Contract Listing - BPO: Version 2.4.0.11 - Example Company

1. This screen defaults to the **Active** status.

2. Select a different **status** from the drop-down menu, if required.

ContractNo	CustomerC...	CustomerName	ContractType	ContractTypeD...	Location	OrderNo	StartDate	EndDate	Department...	Period
CO0000002	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Main		01/03/2014	03/04/2019	Sales Depart...	
CO0000003	DER001	Derton / Technologies	CPC	Cost Per Copy	Forest Hills ...		01/03/2014	01/03/2019	Sales Depart...	
CO0000004	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Forest Hills ...	Test Comm...	07/04/2014	07/04/2019	Sales Depart...	
CO0000005	DER001	Derton / Technologies	CPC	Cost Per Copy	Forest Hills ...	ContractOr...	01/03/2014	01/03/2019	Sales Depart...	
CO0000006	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy	Hillcrest	1234	15/07/2020	17/07/2025	Sales Depart...	
CO0000007	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy	Forest Hills ...		07/01/2014	07/01/2019	Sales Depart...	
CO0000008	YES001	Young Electric	CPC	Cost Per Copy	Durban Area	abc123	05/02/2019	26/11/2020	Sales Depart...	
CO0000009	DER001	Derton / Technologies	CPC	Cost Per Copy	Durban Area		07/05/2014	07/05/2020	Sales Depart...	
CO0000010	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	BPO_RSI		05/01/2011	07/01/2016	Sales Depart...	
CO0000011	WES001	Westwood Dynamic	CPC	Cost Per Copy	Main	ContractOr...	09/05/2014	09/05/2019	Sales Depart...	
CO0000012	TIA001	Titan Group	CPC	Cost Per Copy	Durban Area		16/05/2014	16/05/2019	Sales Depart...	
CO0000013	TIA001	Titan Group	CPC	Cost Per Copy	Durban Area		16/05/2014	16/05/2019	Sales Depart...	
CO0000014	TIA001	Titan Group	CPC	Cost Per Copy	Main		16/05/2014	16/05/2019	Sales Depart...	
CO0000015	TIA001	Titan Group	CPC	Cost Per Copy	Main		20/05/2014	20/05/2019	Sales Depart...	
CO0000016	TIA001	Titan Group	CPC	Cost Per Copy	Main		13/06/2014	13/06/2019	Sales Depart...	
CO0000017	TIA001	Titan Group	CPC	Cost Per Copy	Main		17/06/2014	17/06/2019	Sales Depart...	
CO0000018	SAM001	Samanthas Diner	CPC	Cost Per Copy	Main		09/07/2014	09/07/2019	Sales Depart...	
CO0000019	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Main		28/07/2014	28/07/2019	Sales Depart...	
CO0000020	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Area		01/01/2011	31/01/2016	Sales Depart...	
CO0000021	YES001	Young Electric	CPC	Cost Per Copy	Main		31/07/2014	31/07/2019	Sales Depart...	
CO0000022	SAM001	Samanthas Diner	CPC	Cost Per Copy	Main		05/08/2014	05/08/2019	Sales Depart...	
CO0000023	DER001	Derton / Technologies	CPC	Cost Per Copy	Kloof	CO1254	07/01/2015	07/01/2020	Sales Depart...	

1. This screen defaults to the **Active** status.
2. Select a different **status** from the drop-down menu, if required.

Contract Listing - BPO: Version 2.4.0.11 - Example Company

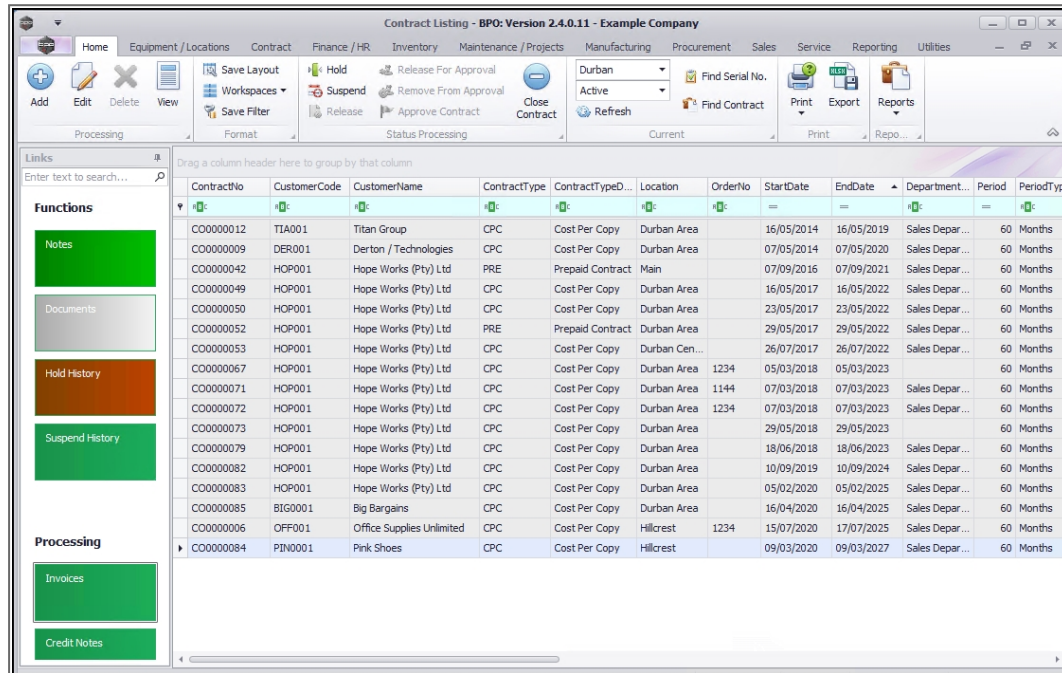
1. This screen defaults to the **Active** status.

2. Select a different **status** from the drop-down menu, if required.

ContractNo	CustomerC...	CustomerName	ContractType	ContractTypeD...	Location	OrderNo	StartDate	EndDate	Department...	Period
CO0000002	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Main		01/03/2014	03/04/2019	Sales Depart...	60 Mk
CO0000003	DER001	Derton / Technologies	CPC	Cost Per Copy	Forest Hills ...		01/03/2014	01/03/2019	Sales Depart...	60 Mk
CO0000004	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Forest Hills ...	Test Comm...	07/04/2014	07/04/2019	Sales Depart...	60 Mk
CO0000005	DER001	Derton / Technologies	CPC	Cost Per Copy	Forest Hills ...	ContractOr...	01/03/2014	01/03/2019	Sales Depart...	60 Mk
CO0000006	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy	Hillcrest	1234	15/07/2020	17/07/2025	Sales Depart...	60 Mk
CO0000007	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy	Forest Hills ...		07/01/2014	07/01/2019	Sales Depart...	60 Mk
CO0000008	YES001	Young Electric	CPC	Cost Per Copy	Durban Area	abc123	05/02/2019	26/11/2020	Sales Depart...	60 Mk
CO0000009	DER001	Derton / Technologies	CPC	Cost Per Copy	Durban Area		07/05/2014	07/05/2020	Sales Depart...	60 Mk
CO0000010	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	BPO_RSI		05/01/2011	07/01/2016	Sales Depart...	60 Mk
CO0000011	WES001	Westwood Dynamic	CPC	Cost Per Copy	Main	ContractOr...	09/05/2014	09/05/2019	Sales Depart...	60 Mk
CO0000012	TIA001	Titan Group	CPC	Cost Per Copy	Durban Area		16/05/2014	16/05/2019	Sales Depart...	60 Mk
CO0000013	TIA001	Titan Group	CPC	Cost Per Copy	Durban Area		16/05/2014	16/05/2019	Sales Depart...	60 Mk
CO0000014	TIA001	Titan Group	CPC	Cost Per Copy	Main		16/05/2014	16/05/2019	Sales Depart...	60 Mk
CO0000015	TIA001	Titan Group	CPC	Cost Per Copy	Main		20/05/2014	20/05/2019	Sales Depart...	60 Mk
CO0000016	TIA001	Titan Group	CPC	Cost Per Copy	Main		13/06/2014	13/06/2019	Sales Depart...	60 Mk
CO0000017	TIA001	Titan Group	CPC	Cost Per Copy	Main		17/06/2014	17/06/2019	Sales Depart...	60 Mk
CO0000018	SAM001	Samanthas Diner	CPC	Cost Per Copy	Main		09/07/2014	09/07/2019	Sales Depart...	60 Mk
CO0000019	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Main		28/07/2014	28/07/2019	Sales Depart...	60 Mk
CO0000020	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Area		01/01/2011	31/01/2016	Sales Depart...	60 Mk
CO0000021	YES001	Young Electric	CPC	Cost Per Copy	Main		31/07/2014	31/07/2019	Sales Depart...	60 Mk
CO0000022	SAM001	Samanthas Diner	CPC	Cost Per Copy	Main		05/08/2014	05/08/2019	Sales Depart...	60 Mk
CO0000023	DER001	Derton / Technologies	CPC	Cost Per Copy	Kloof	CO1254	07/01/2015	07/01/2020	Sales Depart...	60 Mk

## INVOICES FOR CONTRACT SCREEN

- Select the **row** of the **contract** where you wish to **view** the linked Invoices.
- Click on the **Invoices** tile.

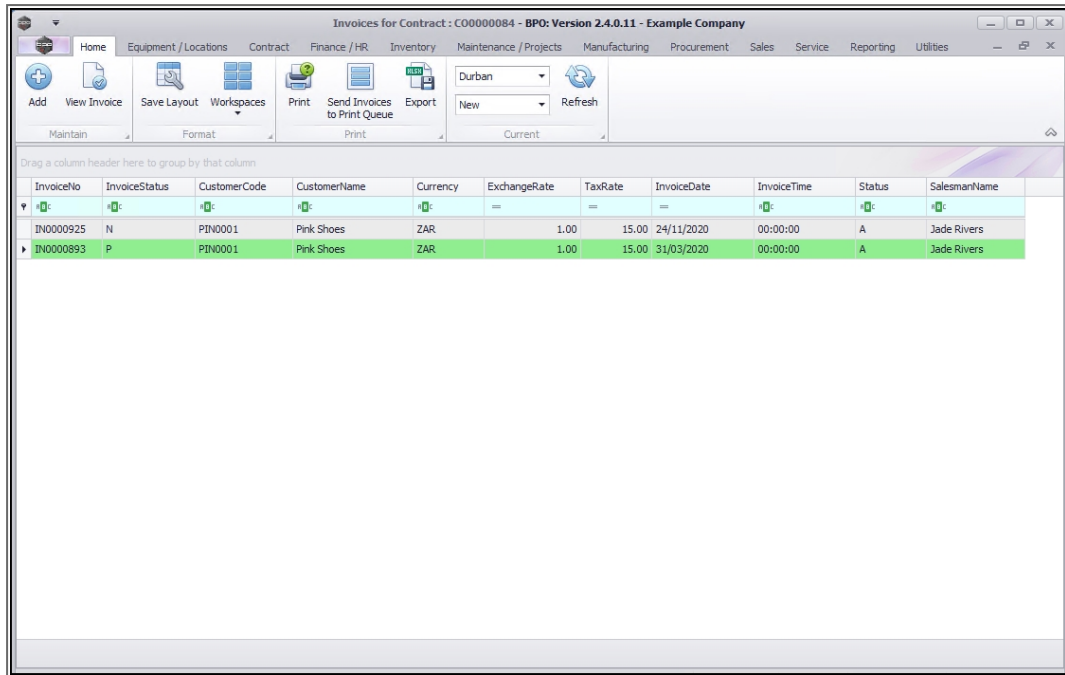


ContractNo	CustomerCode	CustomerName	ContractType	ContractTypeD...	Location	OrderNo	StartDate	EndDate	Department...	Period	PeriodTyp
CO0000012	TIA001	Titan Group	CPC	Cost Per Copy	Durban Area		16/05/2014	16/05/2019	Sales Depart...	60	Months
CO0000009	DER001	Derton / Technologies	CPC	Cost Per Copy	Durban Area		07/05/2014	07/05/2020	Sales Depart...	60	Months
CO0000042	HOP001	Hope Works (Pty) Ltd	PRE	Prepaid Contract	Main		07/09/2016	07/09/2021	Sales Depart...	60	Months
CO0000049	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Area		16/05/2017	16/05/2022	Sales Depart...	60	Months
CO0000050	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Area		23/05/2017	23/05/2022	Sales Depart...	60	Months
CO0000052	HOP001	Hope Works (Pty) Ltd	PRE	Prepaid Contract	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60	Months
CO0000053	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Cen...		26/07/2017	26/07/2022	Sales Depart...	60	Months
CO0000067	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Area	1234	05/03/2018	05/03/2023	Sales Depart...	60	Months
CO0000071	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Area	1144	07/03/2018	07/03/2023	Sales Depart...	60	Months
CO0000072	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60	Months
CO0000073	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60	Months
CO0000079	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months
CO0000082	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60	Months
CO0000083	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Copy	Durban Area		05/02/2020	05/02/2025	Sales Depart...	60	Months
CO0000085	BIG0001	Big Bargains	CPC	Cost Per Copy	Durban Area		16/04/2020	16/04/2025	Sales Depart...	60	Months
CO0000006	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy	Hillcrest	1234	15/07/2020	17/07/2025	Sales Depart...	60	Months
CO0000084	PIW001	Pink Shoes	CPC	Cost Per Copy	Hillcrest		09/03/2020	09/03/2027	Sales Depart...	60	Months

1. The **Invoices for Contract No.: []** screen will open.
2. All the invoices linked to the selected contract will be listed.

## ADD CONTRACT INVOICE

3. Click on **Add**.



The **Maintain Contract Invoice: Add a new invoice** screen will display.

Complete the **Contract Invoice Header** Information:

1. **Customer Name:** Click on the search button in this field and select the customer linked to the contract in the previous screen.
2. **Contract:** Click on the search button in this field and select the row of the contract that you wish to raise a manual invoice against. This should be the contract originally selected in image 4.

Manual Contract Invoice : Add a new invoice - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Calculate Aggregate Save Layout

Maintain Process Format

Customer Name  Invoice No.

Contract  Status

Invoice Date/Time 06/04/2021 00:00:00 Salesman

Order No.  Invoice Currency

Billing Date 06/04/2021 Tax Rate

Remove Inactive Lines ☐ Exchange Rate

Location/ItemDesc	SerialNo	FeeType	FeeTypeDesc	AccountCode	Due	InvoiceLineDescription	VAT

SerialNo	MeterDefCode	AccountCode	OpeningReading	ClosingReading	ReadingDate	MinBilling	MinQuantity	Usage	Due	VAT

Comment

Sub Total 0.00

VAT 0.00

Grand Total 0.00

## PRINT CONTRACT INVOICE

1. You can also Print a contract invoice or send a contract invoice to Print Queue.
2. Click on **Back** to return to the **Contract Listing** screen.

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