

CONTRACT

AUTO BILL FLAG SELECTED

Contract billing has 2 steps:

1. Creating the billing batch
2. Running the billing (which will generate the contract invoices), if the Auto Bill flag is selected in the [Contract Configuration](#)).

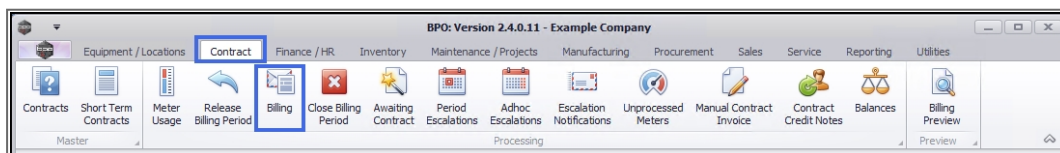
Important Note: The Auto Bill flag

- If the Auto Bill flag is unselected in the Configurator, when the contract billing batch is created and saved, the contract invoices will be not be created by the system. Refer to [Contract Billing - Auto Bill flag unselected](#).

The process set out below depends on the [Auto Bill](#) flag being selected in the Configurator. The contract invoices will be auto-created on running the billing batch. The **Invoices** action button will be inactive in the Contract Billing screen throughout this whole process.

If you run your [Contract Fees](#) and [Contract Meters](#) billing separately (e.g., **Rental** at the beginning of the month, and **Meter Charges** at the end of the month), ensure that you select the correct fee type when you create the billing batch.

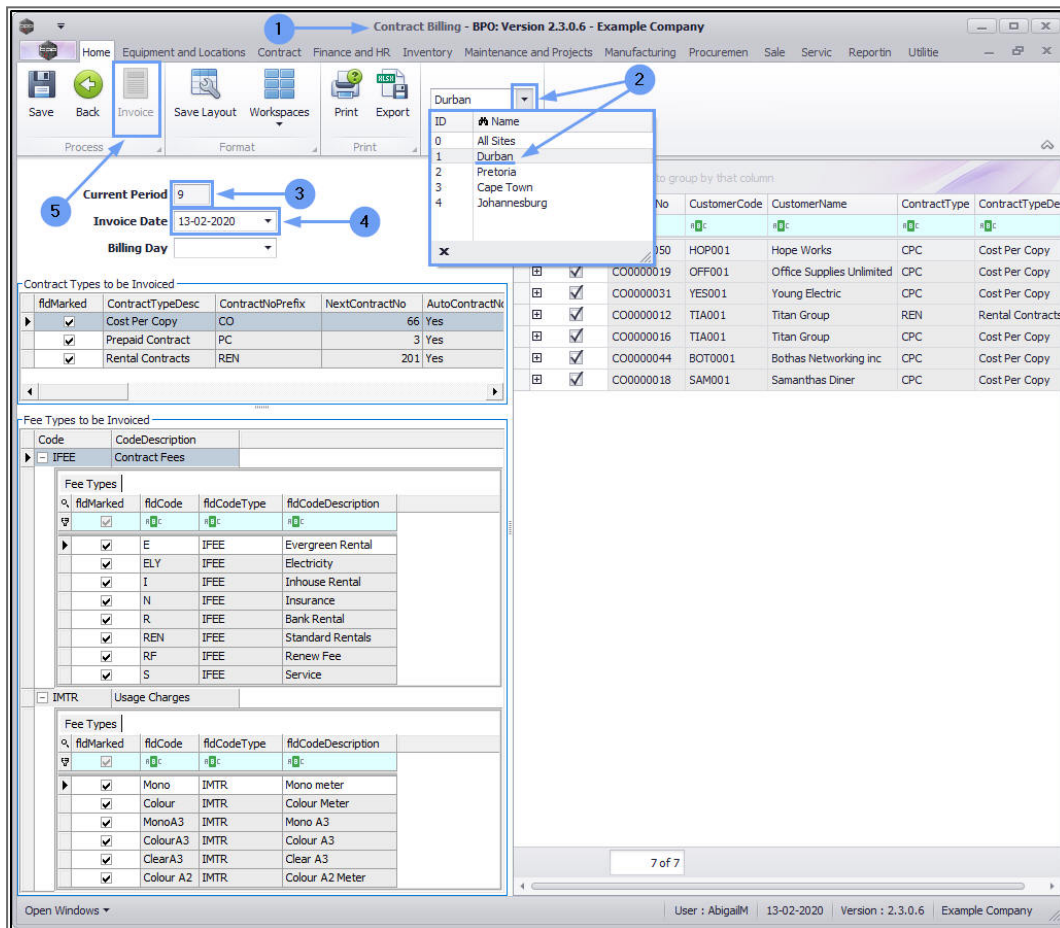
Ribbon Access: *Contract > Billing*



1. The **Contract Billing** screen will be displayed.
2. Select the **site**.
 - In this image **Durban** has been selected.

CURRENT PERIOD & INVOICE DATE

3. **Current Period** This will reflect the current billing period (not financial period).
4. **Invoice Date:** Ensure you select the correct invoice date - this is the date that will reflect on the contract invoices.
5. **Note:** The **Invoice** action button is currently 'inactive' (greyed out).



Contract Billing - BPO: Version 2.3.0.6 - Example Company

Site: Durban

Current Period: 9

Invoice Date: 13-02-2020

Billing Day: 1

Contract Types to be Invoiced:

fidMarked	ContractTypeDesc	ContractNoPrefix	NextContractNo	AutoContractNo
<input checked="" type="checkbox"/>	Cost Per Copy	CO	66	Yes
<input checked="" type="checkbox"/>	Prepaid Contract	PC	3	Yes
<input checked="" type="checkbox"/>	Rental Contracts	REN	201	Yes

Fee Types to be Invoiced:

IFEE - Contract Fees

fidMarked	fidCode	fidCodeType	fidCodeDescription
<input checked="" type="checkbox"/>	E	IFEE	Evergreen Rental
<input checked="" type="checkbox"/>	ELY	IFEE	Electricity
<input checked="" type="checkbox"/>	I	IFEE	Inhouse Rental
<input checked="" type="checkbox"/>	N	IFEE	Insurance
<input checked="" type="checkbox"/>	R	IFEE	Bank Rental
<input checked="" type="checkbox"/>	REN	IFEE	Standard Rentals
<input checked="" type="checkbox"/>	RF	IFEE	Renew Fee
<input checked="" type="checkbox"/>	S	IFEE	Service

IMTR - Usage Charges

fidMarked	fidCode	fidCodeType	fidCodeDescription
<input checked="" type="checkbox"/>	Mono	IMTR	Mono meter
<input checked="" type="checkbox"/>	Colour	IMTR	Colour Meter
<input checked="" type="checkbox"/>	Mono A3	IMTR	Mono A3
<input checked="" type="checkbox"/>	Colour A3	IMTR	Colour A3
<input checked="" type="checkbox"/>	Clear A3	IMTR	Clear A3
<input checked="" type="checkbox"/>	Colour A2	IMTR	Colour A2 Meter

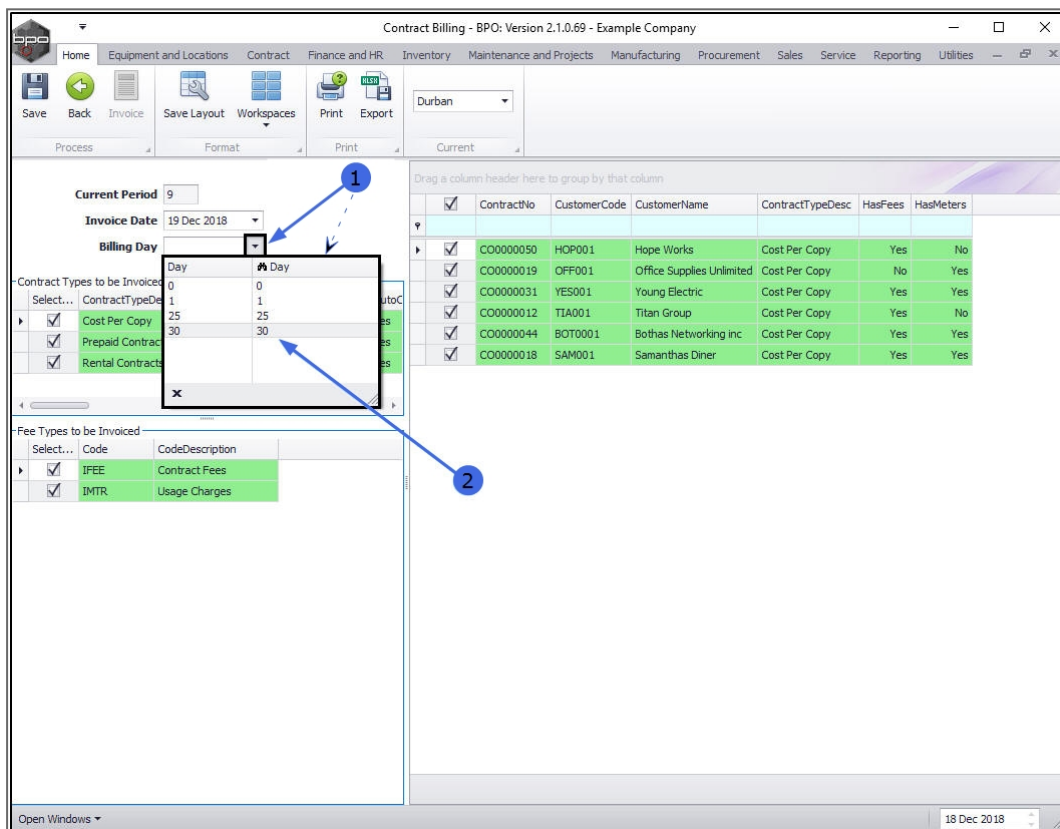
7 of 7

User : AbigailM | 13-02-2020 | Version : 2.3.0.6 | Example Company

BILLING DAY

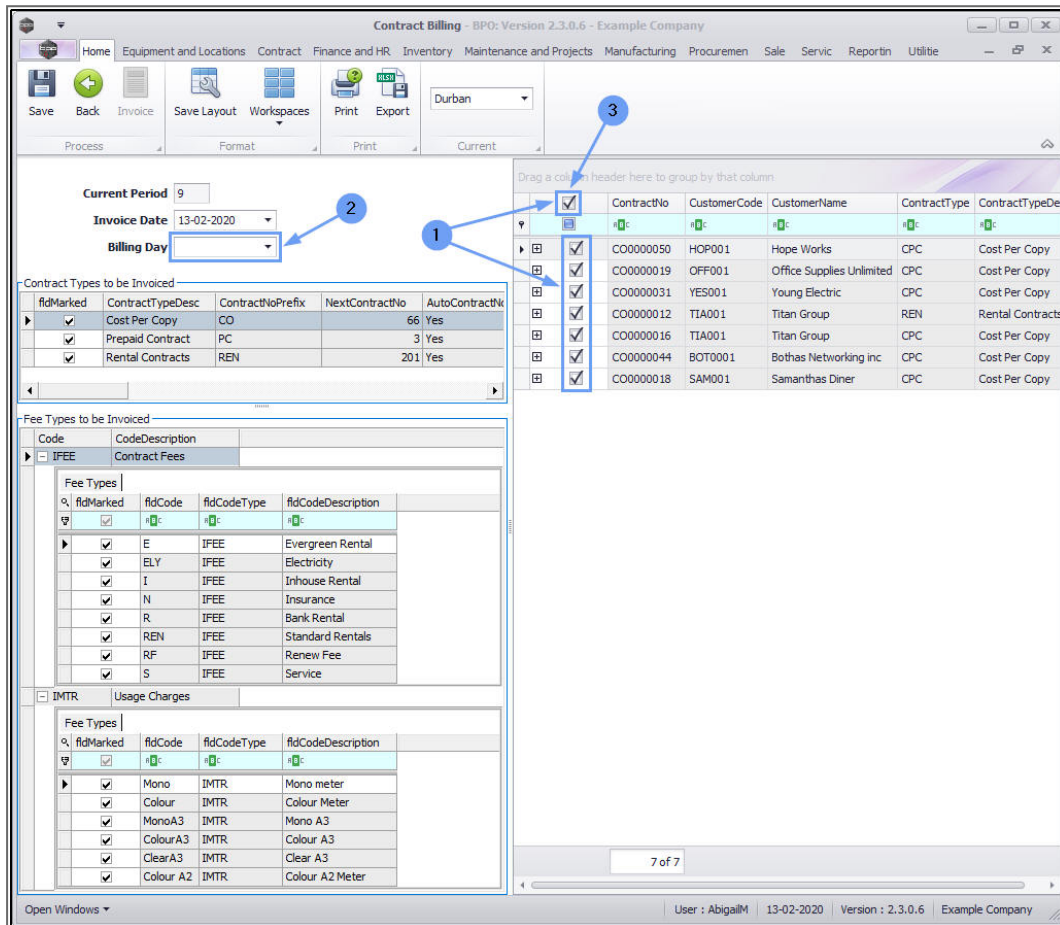
This is an optional selection - and will give you the ability to select contracts by the **Billing Day** configured on the contract. It can be used as a filter in this screen.

1. Click on the drop-down arrow in the **Billing Day** text box to display the **Day** selection list.
2. You may have contracts configured to bill on the **1st** , **25th** and **30th** , as in this example. This will give you the option to multi-select on the contract that you wish to bill currently.



ALL CONTRACTS CHECK BOX

1. All contracts are initially selected by default,
2. unless the **Billing Day** is selected.
3. Use the select **All Contracts** check box to quick select or deselect all contracts as required.



The screenshot shows the 'Contract Billing' software interface. The 'All Contracts' check box is located in the top right corner of the main table. The 'Billing Day' dropdown menu is located in the top left corner of the main table. The 'Contract Types to be Invoiced' table is also visible, showing various contract types and their associated fees.

ContractNo	CustomerCode	CustomerName	ContractType	ContractTypeDe
CO0000050	HOP001	Hope Works	CPC	Cost Per Copy
CO0000019	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy
CO0000031	YES001	Young Electric	CPC	Cost Per Copy
CO0000012	TIA001	Titan Group	REN	Rental Contracts
CO0000016	TIA001	Titan Group	CPC	Cost Per Copy
CO0000044	BOT0001	Bothas Networking inc	CPC	Cost Per Copy
CO0000018	SAM001	Samanthas Diner	CPC	Cost Per Copy

Code	CodeDescription
IFEE	Contract Fees

Fee Types	fidCode	fidCodeType	fidCodeDescription
IFEE	E	IFEE	Evergreen Rental
IFEE	ELY	IFEE	Electricity
IFEE	I	IFEE	Inhouse Rental
IFEE	N	IFEE	Insurance
IFEE	R	IFEE	Bank Rental
IFEE	REN	IFEE	Standard Rentals
IFEE	RF	IFEE	Renew Fee
IFEE	S	IFEE	Service

Fee Types	fidCode	fidCodeType	fidCodeDescription
IMTR	Mono	IMTR	Mono meter
IMTR	Colour	IMTR	Colour Meter
IMTR	MonoA3	IMTR	Mono A3
IMTR	ColourA3	IMTR	Colour A3
IMTR	ClearA3	IMTR	Clear A3
IMTR	Colour A2	IMTR	Colour A2 Meter

CONTRACT TYPES

1. Select the **Contract Types** to be billed.
2. All Contract Types are initially selected by default. **Deselect** individual Contract Types that you do not wish to bill at this time.

Contract Billing - BPO: Version 2.3.0.6 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sale Service Reportin Utilite

Save Back Invoice Save Layout Workspaces Print Export Durban

Process Format Print Current

Current Period 9

Invoice Date 13-02-2020

Billing Day

Contract Types to be Invoiced

ContractTypeDesc	ContractNoPrefix	NextContractNo	AutoContractNo
Cost Per Copy	CO	66	Yes
Prepaid Contract	PC	3	Yes
Rental Contracts	REN	201	Yes

Fee Types to be Invoiced

IFEE Contract Fees

Fee Types	fidMarked	fidCode	fidCodeType	fidCodeDescription
E	<input checked="" type="checkbox"/>	IFEE	IFEE	Evergreen Rental
ELY	<input checked="" type="checkbox"/>	IFEE	IFEE	Electricity
I	<input checked="" type="checkbox"/>	IFEE	IFEE	Inhouse Rental
N	<input checked="" type="checkbox"/>	IFEE	IFEE	Insurance
R	<input checked="" type="checkbox"/>	IFEE	IFEE	Bank Rental
REN	<input checked="" type="checkbox"/>	IFEE	IFEE	Standard Rentals
RF	<input checked="" type="checkbox"/>	IFEE	IFEE	Renew Fee
S	<input checked="" type="checkbox"/>	IFEE	IFEE	Service

IMTR Usage Charges

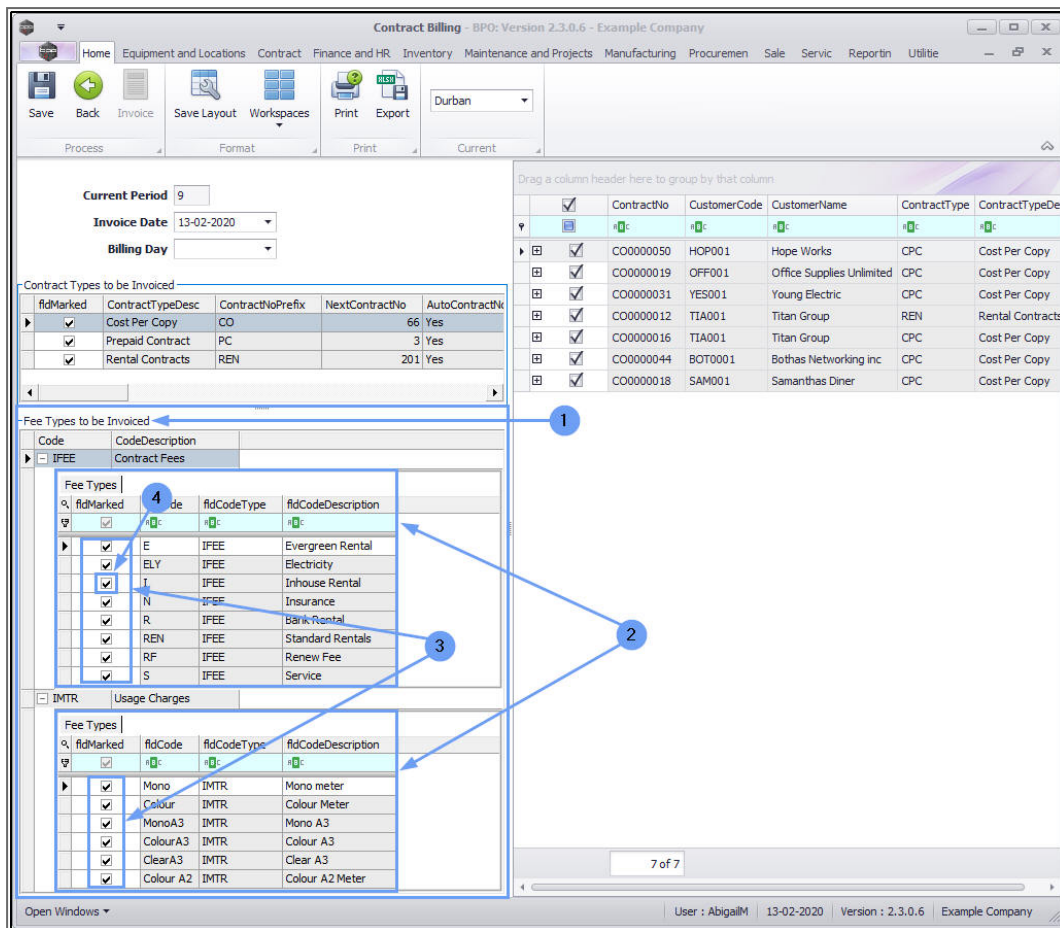
Fee Types	fidMarked	fidCode	fidCodeType	fidCodeDescription
Mono	<input checked="" type="checkbox"/>	IMTR	IMTR	Mono meter
Colour	<input checked="" type="checkbox"/>	IMTR	IMTR	Colour Meter
MonoA3	<input checked="" type="checkbox"/>	IMTR	IMTR	Mono A3
ColourA3	<input checked="" type="checkbox"/>	IMTR	IMTR	Colour A3
ClearA3	<input checked="" type="checkbox"/>	IMTR	IMTR	Clear A3
Colour A2	<input checked="" type="checkbox"/>	IMTR	IMTR	Colour A2 Meter

7 of 7

User : AbigailM 13-02-2020 Version : 2.3.0.6 Example Company

FEE TYPES

1. Select the contract **Fee Types** to be billed.
2. You will note that upon opening the Contract Billing screen, that both Fee Types sub grids; (**FEE: Contract Fees** and **MTR: Usage Charges**) are auto expanded.
3. All Fee Types are initially selected by default.
4. Deselect any Fee Type(s) that you do not wish to bill at this time.



Contract Billing - BPO: Version 2.3.0.6 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sale Service Reportin Utilite

Save Back Invoice Save Layout Workspaces Print Export Durban

Process Format Print Current

Current Period 9

Invoice Date 13-02-2020

Billing Day

Contract Types to be Invoiced

fidMarked	ContractTypeDesc	ContractNoPrefix	NextContractNo	AutoContractNo
<input checked="" type="checkbox"/>	Cost Per Copy	CO	66	Yes
<input checked="" type="checkbox"/>	Prepaid Contract	PC	3	Yes
<input checked="" type="checkbox"/>	Rental Contracts	REN	201	Yes

Fee Types to be Invoiced

Code CodeDescription

☒ IFEE Contract Fees

fidMarked	fidCode	fidCodeType	fidCodeDescription
<input checked="" type="checkbox"/>	E	IFEE	Evergreen Rental
<input checked="" type="checkbox"/>	ELY	IFEE	Electricity
<input checked="" type="checkbox"/>	I	IFEE	Inhouse Rental
<input checked="" type="checkbox"/>	N	IFEE	Insurance
<input checked="" type="checkbox"/>	R	IFEE	Bank Rental
<input checked="" type="checkbox"/>	REN	IFEE	Standard Rentals
<input checked="" type="checkbox"/>	RF	IFEE	Renew Fee
<input checked="" type="checkbox"/>	S	IFEE	Service

☒ IMTR Usage Charges

fidMarked	fidCode	fidCodeType	fidCodeDescription
<input checked="" type="checkbox"/>	Mono	IMTR	Mono meter
<input checked="" type="checkbox"/>	Colour	IMTR	Colour Meter
<input checked="" type="checkbox"/>	MonoA3	IMTR	Mono A3
<input checked="" type="checkbox"/>	ColourA3	IMTR	Colour A3
<input checked="" type="checkbox"/>	ClearA3	IMTR	Clear A3
<input checked="" type="checkbox"/>	Colour A2	IMTR	Colour A2 Meter

7 of 7

User : AbigailM 13-02-2020 Version : 2.3.0.6 Example Company

THE CONTRACTS FRAME

1. This frame lists ***all*** Contracts that are available for billing.
2. **Note:** All Contracts are initially selected by default.
3. You can use the **All Contracts checkbox** to 'quick' deselect all Contract (s)
4. or deselect check boxes individually for the contracts that you do not wish to bill at this time.

Contract Billing - BPO: Version 2.3.0.6 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sale | Service | Reportin | Utilite

Save | Back | Invoice | Save Layout | Workspaces | Print | Export | Durban

Process | Format | Print | Current

Current Period: 9
 Invoice Date: 13-02-2020
 Billing Day: [Dropdown]

Contract Types to be Invoiced

fidMarked	ContractTypeDesc	ContractNoPrefix	NextContractNo	AutoContractNo
<input checked="" type="checkbox"/>	Cost Per Copy	CO	66	Yes
<input checked="" type="checkbox"/>	Prepaid Contract	PC	3	Yes
<input checked="" type="checkbox"/>	Rental Contracts	REN	201	Yes

Fee Types to be Invoiced

IFEE Contract Fees

fidMarked	fidCode	fidCodeType	fidCodeDescription
<input checked="" type="checkbox"/>	E	IFEE	Evergreen Rental
<input checked="" type="checkbox"/>	ELY	IFEE	Electricity
<input checked="" type="checkbox"/>	I	IFEE	Inhouse Rental
<input checked="" type="checkbox"/>	N	IFEE	Insurance
<input checked="" type="checkbox"/>	R	IFEE	Bank Rental
<input checked="" type="checkbox"/>	REN	IFEE	Standard Rentals
<input checked="" type="checkbox"/>	RF	IFEE	Renew Fee
<input checked="" type="checkbox"/>	S	IFEE	Service

IMTR Usage Charges

fidMarked	fidCode	fidCodeType	fidCodeDescription
<input checked="" type="checkbox"/>	Mono	IMTR	Mono meter
<input checked="" type="checkbox"/>	Colour	IMTR	Colour Meter
<input checked="" type="checkbox"/>	MonoA3	IMTR	Mono A3
<input checked="" type="checkbox"/>	ColourA3	IMTR	Colour A3
<input checked="" type="checkbox"/>	ClearA3	IMTR	Clear A3
<input checked="" type="checkbox"/>	Colour A2	IMTR	Colour A2 Meter

Contract List

ContractNo	CustomerCode	CustomerName	ContractType	ContractTypeDe
<input checked="" type="checkbox"/>	CO0000050	HOP001	Hope Works	CPC
<input checked="" type="checkbox"/>	CO0000019	OFF001	Office Supplies Unlimited	CPC
<input checked="" type="checkbox"/>	CO0000031	YES001	Young Electric	CPC
<input checked="" type="checkbox"/>	CO0000012	TIA001	Titan Group	REN
<input checked="" type="checkbox"/>	CO0000016	TIA001	Titan Group	CPC
<input checked="" type="checkbox"/>	CO0000044	BOT0001	Bothas Networking inc	CPC
<input checked="" type="checkbox"/>	CO0000018	SAM001	Samanthas Diner	CPC

7 of 7

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RENTAL / SERVICE CHARGE BILLING

(if running separately)

1. Under **Fee Types**, make sure only **IFEE** (Contract Fees) are selected.
2. **IMTR** Usage Charges must be deselected.

- **Note:** This will only generate billing for contracts which have **Rental** or **Service** charges set up.

Contract Billing - BPO: Version 2.3.0.6 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sale Service Reportin Utilite

Save Back Invoice Save Layout Workspaces Print Export Durban

Process Format Print Current

Current Period 9

Invoice Date 13-02-2020

Billing Day

Contract Types to be Invoiced

fidMarked	ContractTypeDesc	ContractNoPrefix	NextContractNo	AutoContractNo
<input checked="" type="checkbox"/>	Cost Per Copy	CO	66	Yes
<input checked="" type="checkbox"/>	Prepaid Contract	PC	3	Yes
<input checked="" type="checkbox"/>	Rental Contracts	REN	201	Yes

Fee Types to be Invoiced

IFEE Contract Fees

Fee Types	fidMarked	fidCode	fidCodeType	fidCodeDescription
<input checked="" type="checkbox"/>	E	IFEE	Evergreen Rental	
<input checked="" type="checkbox"/>	ELY	IFEE	Electricity	
<input checked="" type="checkbox"/>	I	IFEE	Inhouse Rental	
<input checked="" type="checkbox"/>	N	IFEE	Insurance	
<input checked="" type="checkbox"/>	R	IFEE	Bank Rental	
<input checked="" type="checkbox"/>	REN	IFEE	Standard Rentals	
<input checked="" type="checkbox"/>	RF	IFEE	Renew Fee	
<input checked="" type="checkbox"/>	S	IFEE	Service	

IMTR Usage Charges

Fee Types	fidMarked	fidCode	fidCodeType	fidCodeDescription
<input checked="" type="checkbox"/>	Monio	IMTR	Monio meter	
<input checked="" type="checkbox"/>	Colour	IMTR	Colour Meter	
<input checked="" type="checkbox"/>	MonioA3	IMTR	Monio A3	
<input checked="" type="checkbox"/>	ColourA3	IMTR	Colour A3	
<input checked="" type="checkbox"/>	ClearA3	IMTR	Clear A3	
<input checked="" type="checkbox"/>	Colour A2	IMTR	Colour A2 Meter	

Drag a column header here to group by that column.

<input checked="" type="checkbox"/>	ContractNo	CustomerCode	CustomerName	ContractType	ContractTypeDe
<input checked="" type="checkbox"/>	CO0000050	HOP001	Hope Works	CPC	Cost Per Copy
<input checked="" type="checkbox"/>	CO0000019	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy
<input checked="" type="checkbox"/>	CO0000031	YES001	Young Electric	CPC	Cost Per Copy
<input checked="" type="checkbox"/>	CO0000012	TIA001	Titan Group	REN	Rental Contracts
<input checked="" type="checkbox"/>	CO0000016	TIA001	Titan Group	CPC	Cost Per Copy
<input checked="" type="checkbox"/>	CO0000044	BOT0001	Bothas Networking inc	CPC	Cost Per Copy
<input checked="" type="checkbox"/>	CO0000018	SAM001	Samanthas Diner	CPC	Cost Per Copy

3 of 7

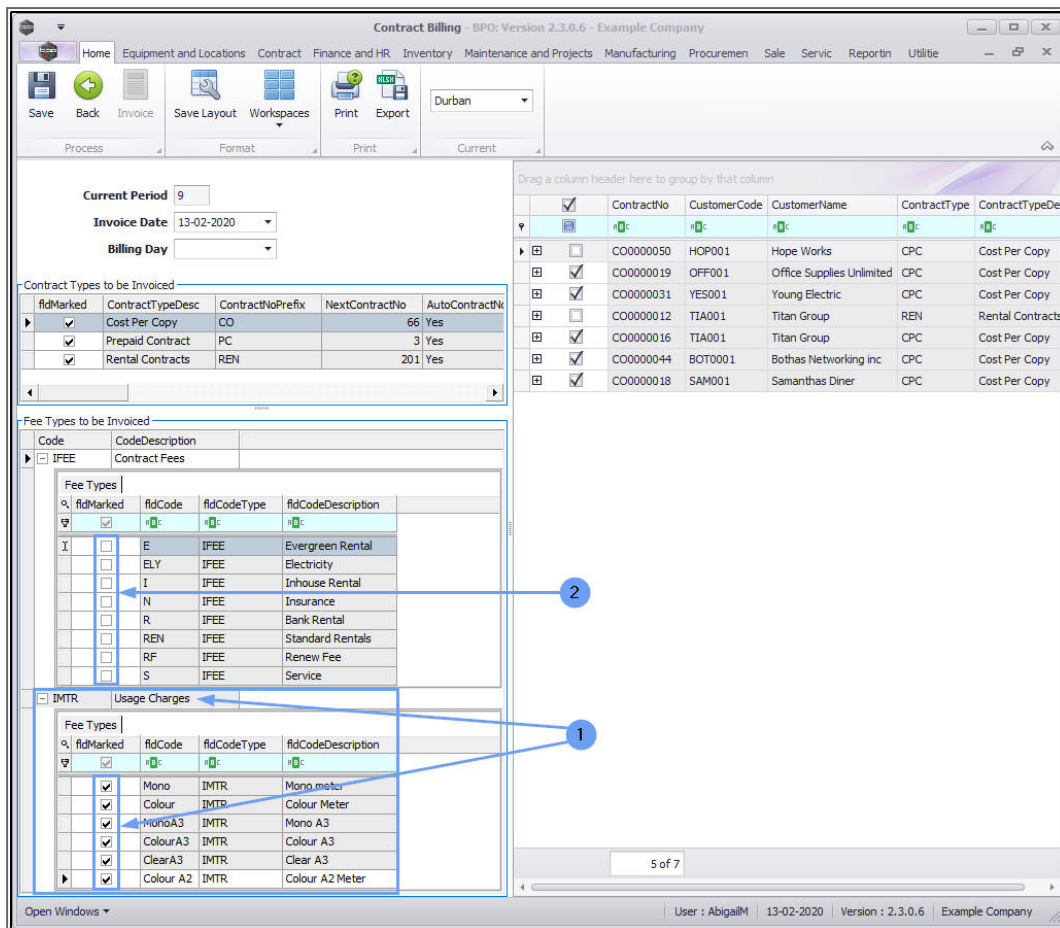
User : AbigailM 13-02-2020 Version : 2.3.0.6 Example Company

COST PER COPY BILLING

(if running separately)

1. Under 'Fee Types', make sure only **IMTR** (Usage Charges) are selected.
2. **IFEE** Contract Fees must be deselected.

- **Note:** This will only generate billing for contracts which have **cost per copy** charges set up.



SAVE BILLING BATCH AND CREATE INVOICES

Once you have selected the:

1. **Contract Types**,
2. **Contracts** and
3. **Fee Types** that you wish to bill,
4. Click on **Save**.
5. **Note:** At this point, the **Invoice** action button is still inactive (greyed out).

Contract Billing - BPO: Version 2.3.0.6 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sale Service Reportin Utilite

Save Back Invoice Save Layout Workspaces Print Export Durban

Process Format Print Current

Current Period 9

Invoice Date 13-02-2020

Billing Day

Contract Types to be Invoiced

	ContractTypeDesc	ContractNoPrefix	NextContractNo	AutoContractNo
<input checked="" type="checkbox"/>	Cost Per Copy	CO	66	Yes
<input type="checkbox"/>	Prepaid Contract	PC	3	Yes
<input type="checkbox"/>	Rental Contracts	REN	201	Yes

Fee Types to be Invoiced

Code CodeDescription

IFEE Contract Fees

Fee Types	fidMarked	fidCode	fidCodeType	fidCodeDescription
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	E	IFEE	Evergreen Rental
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ELY	IFEE	Electricity
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	I	IFEE	Inhouse Rental
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N	IFEE	Insurance
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	R	IFEE	Bank Rental
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	REN	IFEE	Standard Rentals
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RF	IFEE	Renew Fee
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	S	IFEE	Service

IMTR Usage Charges

Fee Types	fidMarked	fidCode	fidCodeType	fidCodeDescription
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>	Mono	IMTR	Mono meter
<input type="checkbox"/>	<input type="checkbox"/>	Colour	IMTR	Colour Meter
<input type="checkbox"/>	<input type="checkbox"/>	MonoA3	IMTR	Mono A3
<input type="checkbox"/>	<input type="checkbox"/>	ColourA3	IMTR	Colour A3
<input type="checkbox"/>	<input type="checkbox"/>	ClearA3	IMTR	Clear A3
<input type="checkbox"/>	<input type="checkbox"/>	Colour A2	IMTR	Colour A2 Meter

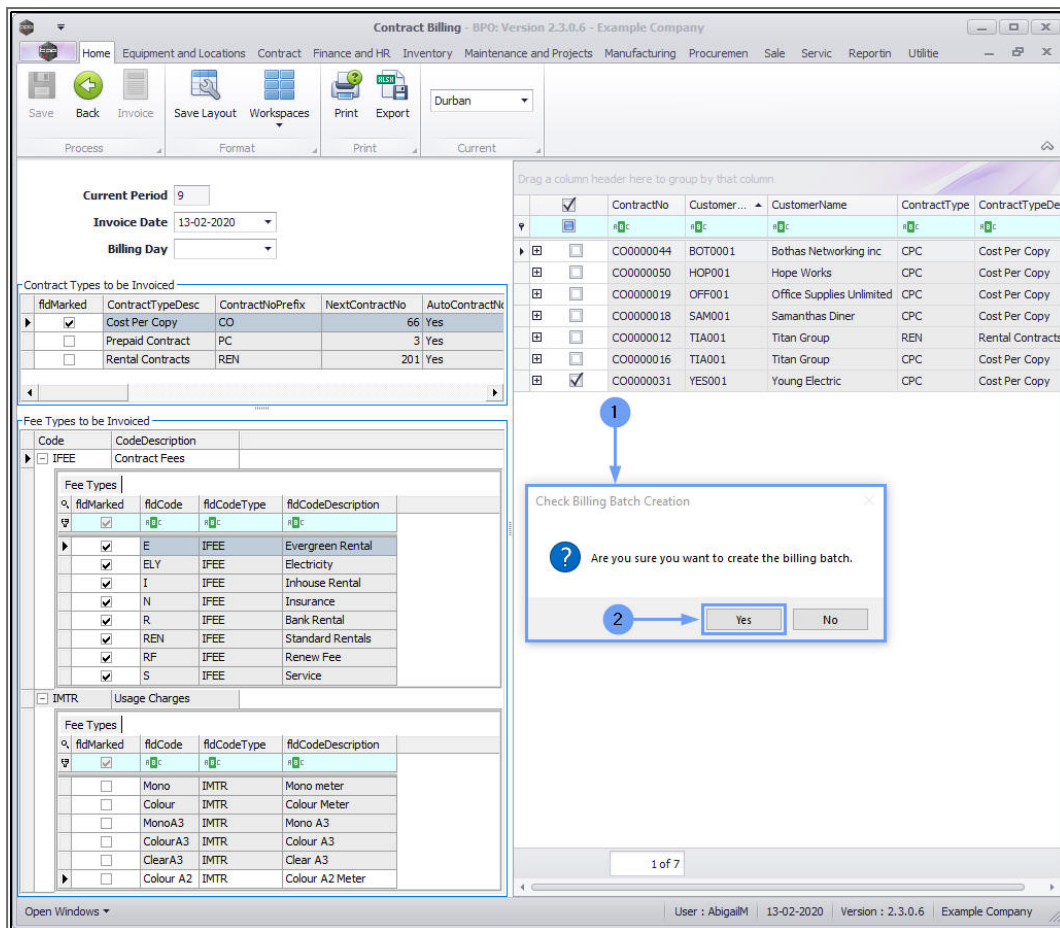
Drag a column header here to group by that column.

	ContractNo	Customer...	CustomerName	ContractType	ContractTypeDe
<input checked="" type="checkbox"/>	CO0000044	BOT0001	Bothas Networking inc	CPC	Cost Per Copy
<input type="checkbox"/>	CO0000050	HOP001	Hope Works	CPC	Cost Per Copy
<input type="checkbox"/>	CO0000019	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy
<input type="checkbox"/>	CO0000018	SAM001	Samanthas Diner	CPC	Cost Per Copy
<input type="checkbox"/>	CO0000012	TIA001	Titan Group	REN	Rental Contracts
<input type="checkbox"/>	CO0000016	TIA001	Titan Group	CPC	Cost Per Copy
<input checked="" type="checkbox"/>	CO0000031	YES001	Young Electric	CPC	Cost Per Copy

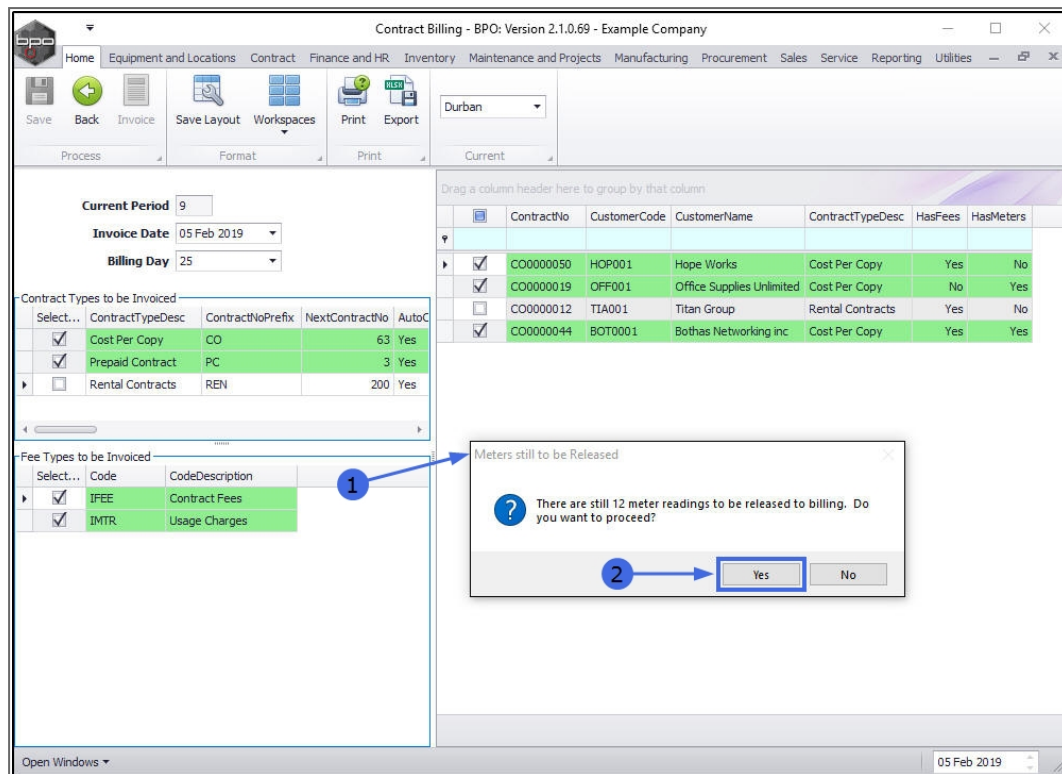
1 of 7

User : AbigailM 13-02-2020 Version : 2.3.0.6 Example Company

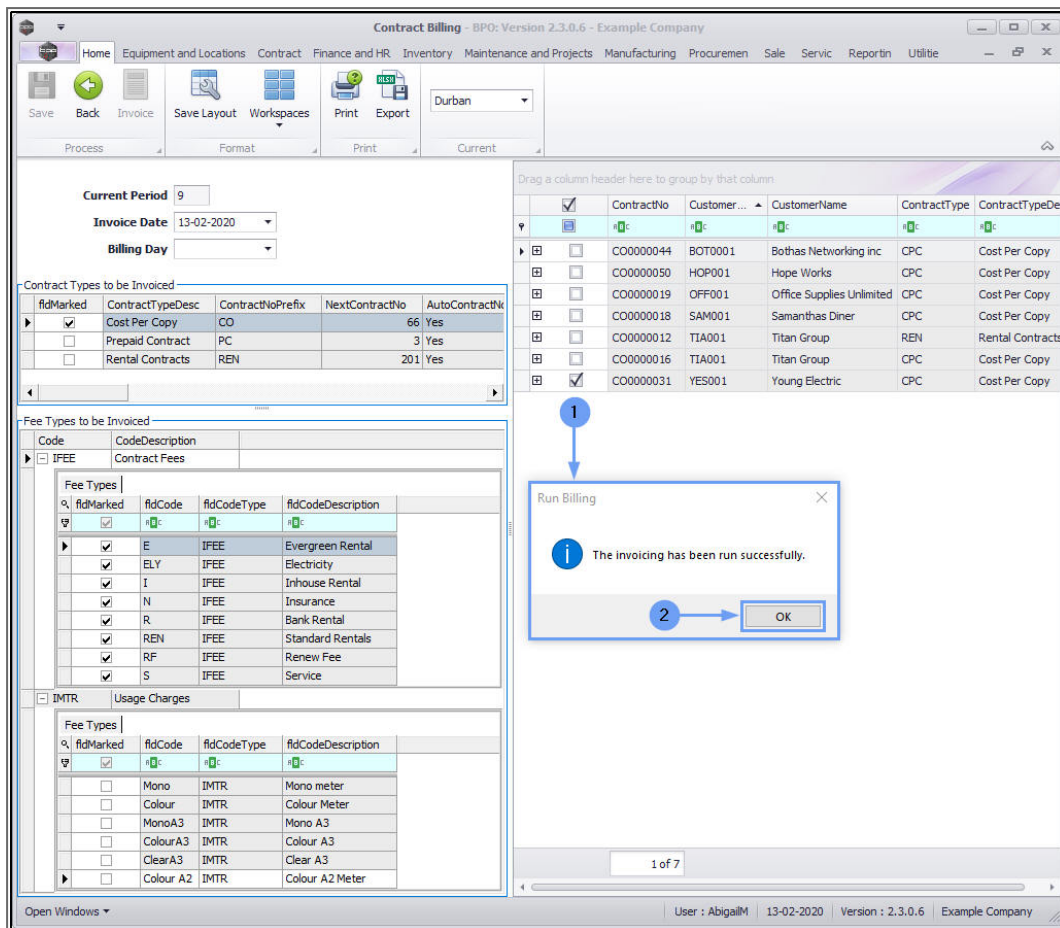
1. A **Check Billing Batch Creation** message box will pop up, asking;
 - Are you sure you want to create the billing batch?
2. Click on **Yes**.



1. If all meters have not been **released to billing** - a **Meters still to be Released** message box will pop up asking:
 - *There are still [] meters to be released to billing. Do you want to proceed?*
2. Click on **Yes**.



1. A **Run Billing** message box will pop up informing you that:
 - *The invoicing has been run successfully.*
2. Click on **OK**.

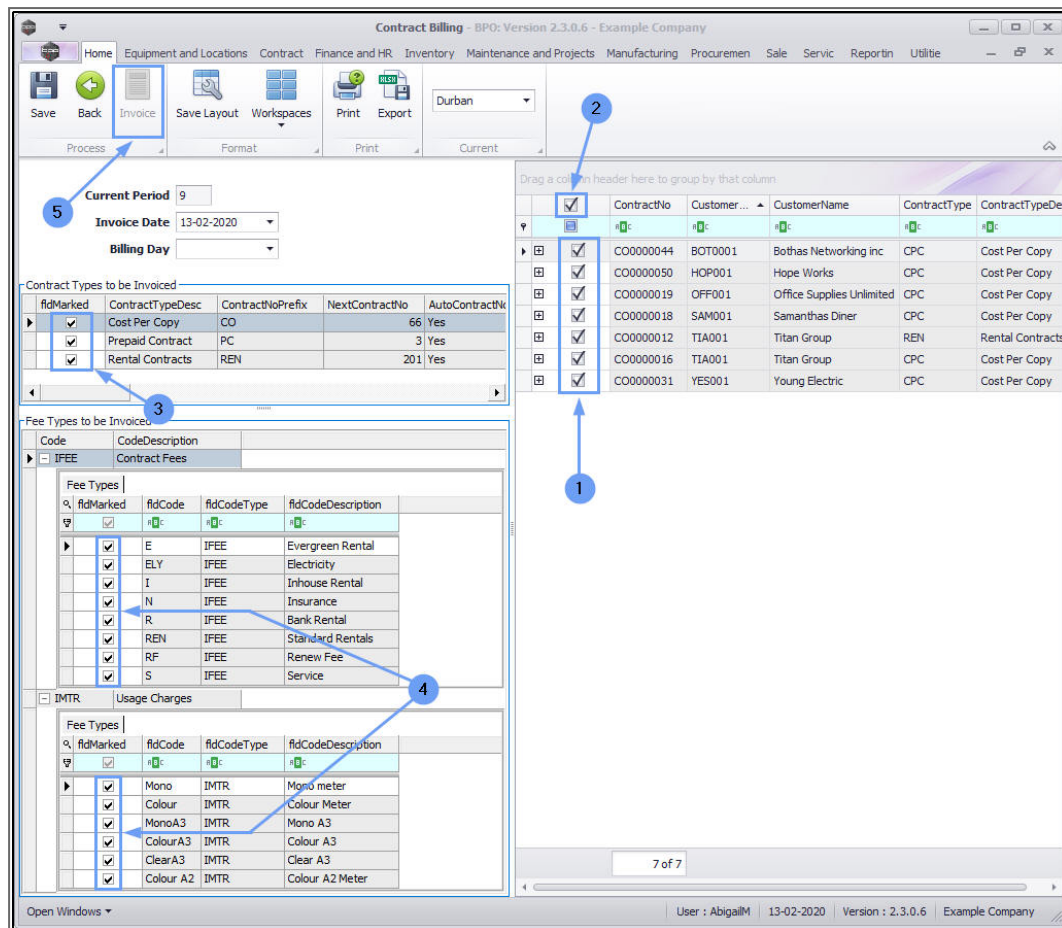


The screen will refresh:

1. The list of **contracts** will be auto selected.
2. The **Select All Contracts** check box will be auto selected.
3. All of the **Contract Types** will be auto selected.
4. All of the **Fee Types** will be auto selected.

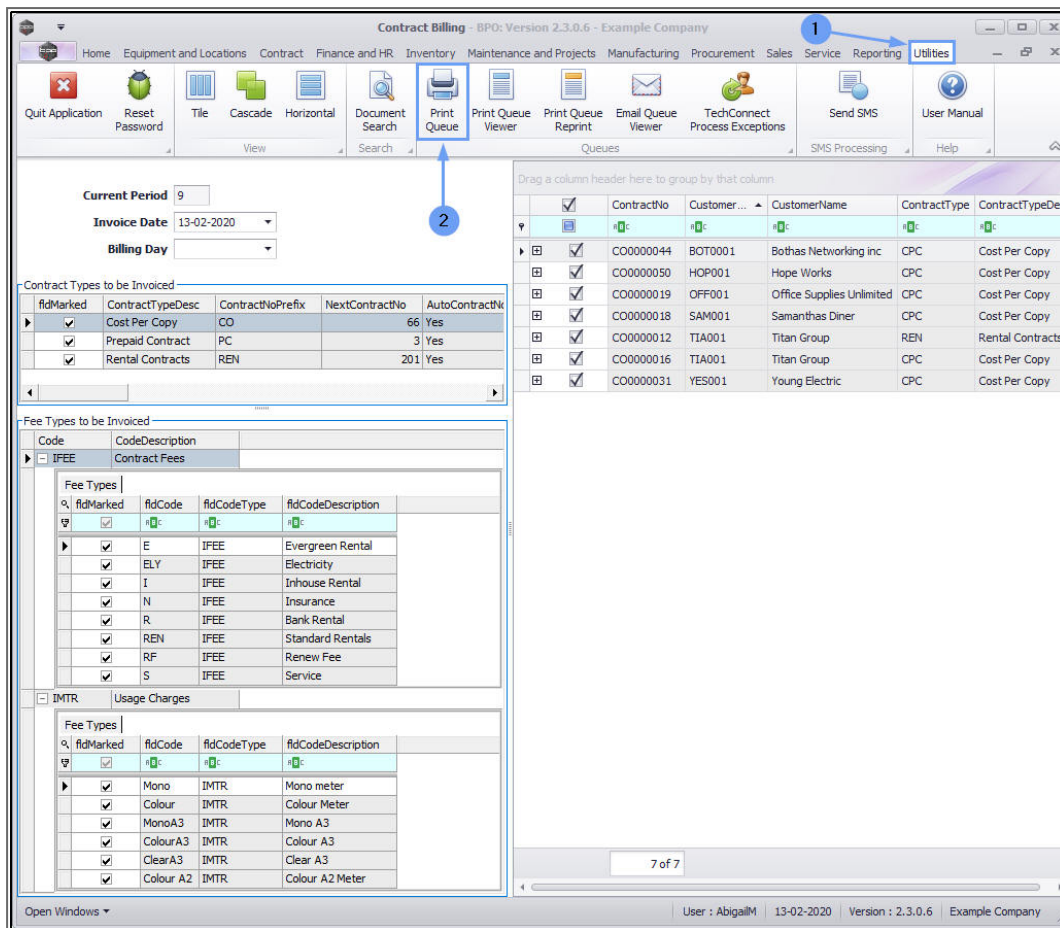
Invoice Button Remains Inactive

1. **Note:**The **Invoice** action button remains inactive (greyed out) as the contract invoices have been auto-created by the system as a result of the **Auto Bill** flag in the Configurator being ticked.

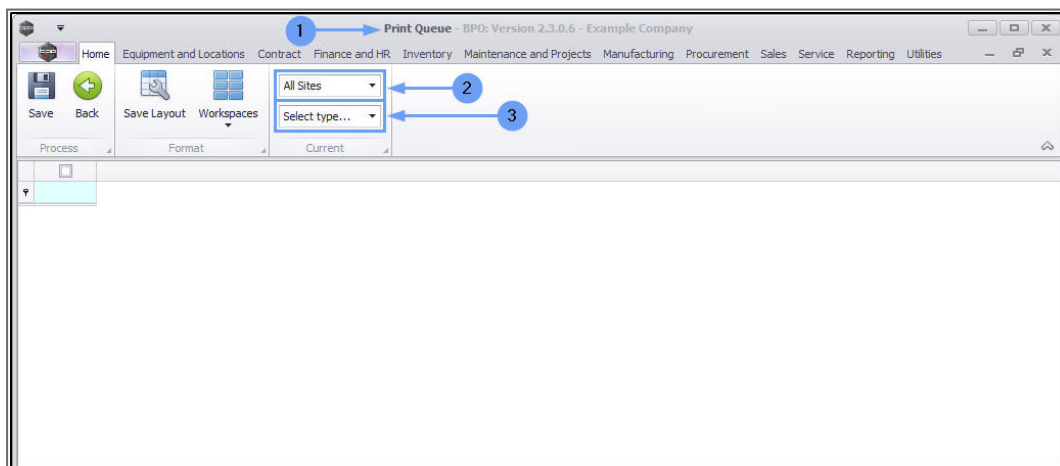


VIEW AUTO-CREATED INVOICES IN PRINT QUEUE

1. To view the auto-created invoices select the **Utilities** tab.
2. In the Utilities toolbar, select **Print Queue**.

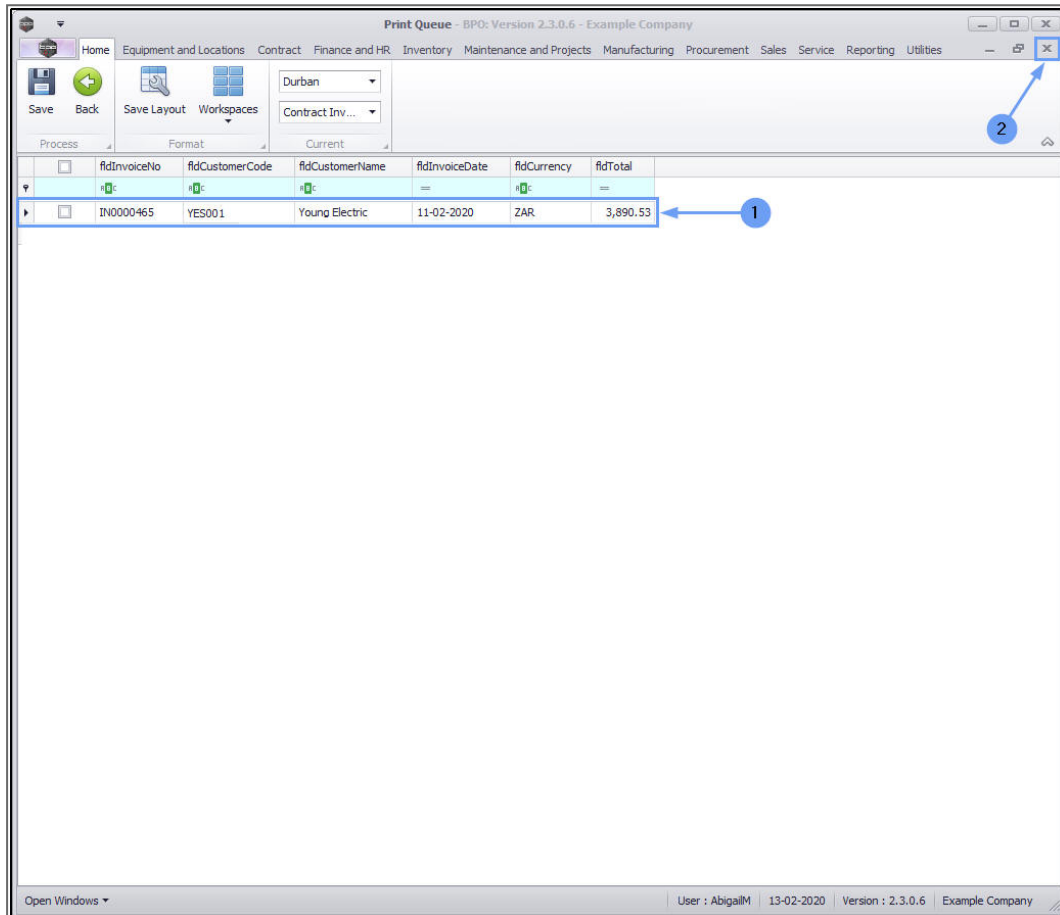


1. The **Print Queue** screen will open.
2. Select the **Site** that you initiated the contract billing from.
3. Set the **Type** to Contract Invoices.



1. The data grid will refresh to display the ***Contract Invoice(s)*** that were auto-raised when you created the billing batch in the Contract Billing screen.
2. ***Close*** the screen when you are done.

For more information regarding the functionality of this screen, refer to **Print Queue**.



MNU.117.001