

CONTRACT

AUTO BILL FLAG UNSELECTED

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 selected in the Configurator, when the contract billing batch is created and saved, the contract invoices will be <u>auto-created</u> by the system. Refer to Contract Processing.

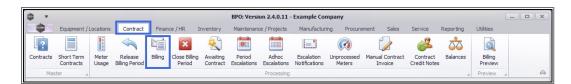
The process set out below depends on the Auto Bill flag being <u>un</u>selected in the Configurator. The contract invoices will <u>not</u> be created on running the billing batch. The Invoices action button will become <u>active</u> in the Contract Billing screen upon creating and saving the billing batch ready for the user to process the invoices when convenient.

Example: This scenario may occur when a company has a <u>sub-</u><u>stantial</u> number of invoices to be created. Instead of slowing down the system and running them at the same time as the Billing Batch, the invoices can be created after hours when the system is freed up.

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 (<u>not</u> financial period).
- 4. **Invoice Date**: Ensure you select the correct invoice date this is the date that will reflect on the contract invoice(s).
- 5. Note: The Invoice action button is currently 'inactive' (greyed out).

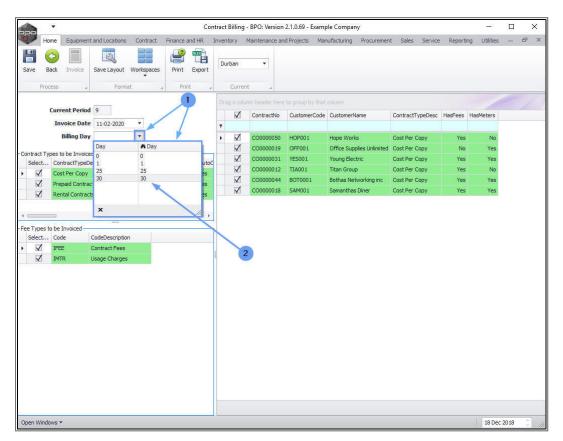
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BILLING DAY

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

- 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 contracts that you wish to bill currently.





ALL CONTRACTS CHECK BOX

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

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CONTRACT TYPES

- 1. Select the Contract Types to be billed.
- 2. <u>All</u> Contract Types are initially selected by default. <u>Deselect</u> individual Contract Type(s) that you do <u>not</u> wish to bill at this time.



Auto Bill Flag Unselected

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FEE TYPES

- 1. Select the contract *Fee Types* to be billed.
- 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. <u>All</u> Fee Types are initially selected by default.
- 4. <u>Deselect</u> any Fee Type(s) that you do <u>not</u> wish to bill at this time.



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CONTRACTS FRAME

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



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RENTAL / SERVICE CHARGE BILLING

(if running separately)

- 1. Under **Fee Types**, make sure <u>only</u>**IFEE** (Contract Fees) are selected.
- 2. **IMTR** Usage Charges must be <u>de</u>selected.
 - Note: This will <u>only</u> generate billing for contracts which have *Rental* or *Service* charges set up.



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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 <u>de</u>selected.
 - Note: This will <u>only</u> generate billing for contracts which have *cost per copy* charges set up.



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CREATE BILLING BATCH

Once you have selected the:

- 1. Contract Types,
- 2. Contracts and
- 3. Fee Types that you wish to bill,
- 4. click on *Save*.



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- 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.



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- If all meters have <u>not</u> 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.



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- 1. A *Contract Billing* message box will pop up informing you that:
 - The Billing batch has been successfully created.
- 2. Click on OK.



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The screen will refresh:

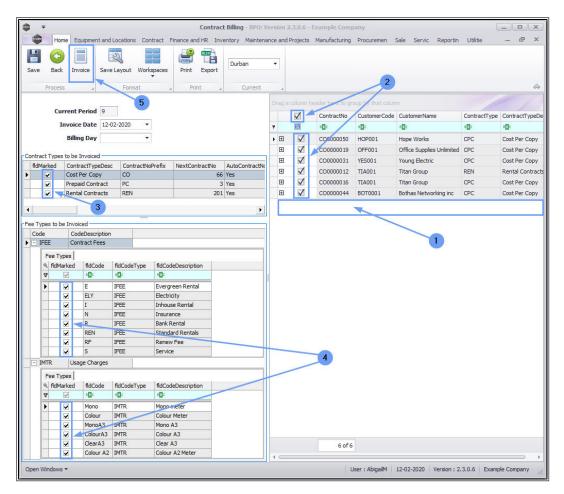
- 1. The list of *contracts* billed will clear out.
- 2. The *All Contracts* check box and the remaining contracts will be auto selected.
- 3. All of the *Contract Types* will be auto selected.
- 4. All of the *Fee Types* will be auto selected.

INVOICE BUTTON NOW ACTIVATED

5. The *Invoice* action button has now become *'active'* ready for you to select it, to create the contract invoices at a convenient time. This button activation is a result of the Auto Bill flag in the Configurator being



<u>un</u>ticked. Invoices are not auto-created on billing therefore must be manually created by using this button.



To see that the invoices have not yet been created, go to Utilities Print Queue, first select the correct *Site* and then set the *Type* to *Contract Invoice*. You should <u>not</u> see any invoices relating to the contract that you released for billing using the process documented here.

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