SALES

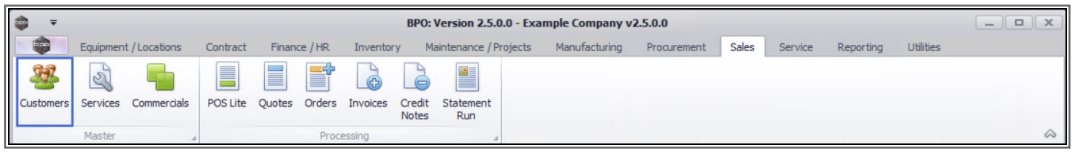
CUSTOMERS - CONTRACT INVOICES

The **Contract Invoices** tile for a Customer 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). However, if you create a contract invoice for fees only, the meters will bill month end, without the fees.

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

This manual provide a brief outline of the process from the Contract Invoices Tile. For a detailed handling of this topic refer to Manual Contract Invoice - Unconsolidated Customer

Ribbon Access: *Sales > Customers*



1. The ***Customer Listing*** screen will be displayed.
2. Select the ***Site*** where the customer can be located.
    - The example has ***Durban*** selected.
3. Select the ***Status*** for the customer.
    - The example has ***Active*** selected.

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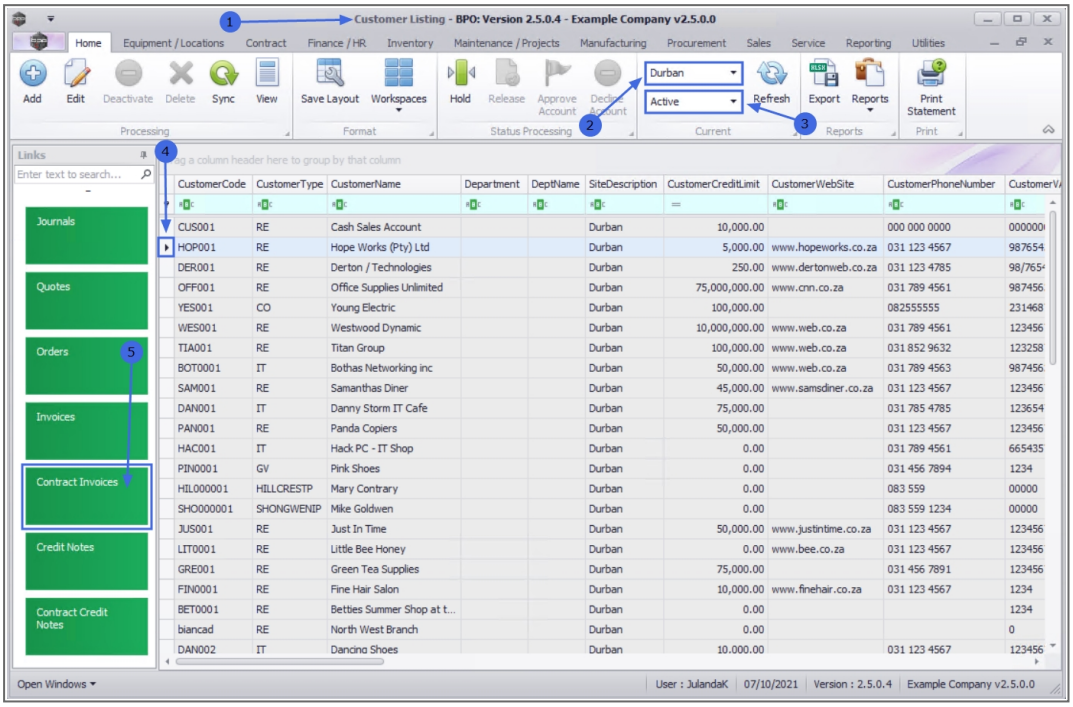
4. Select the ***row*** of the ***customer*** whose contract invoices you wish to work with.
5. Click on the ***Contract Invoices*** tile.



6. The ***Contract Invoices for Customer : [customer code]*** screen will display.

ADD CONTRACT INVOICE

7. Click on ***Add***.

> **Short cut key:** ***Right click*** to display the ***Process*** menu list. Click on ***Add***.

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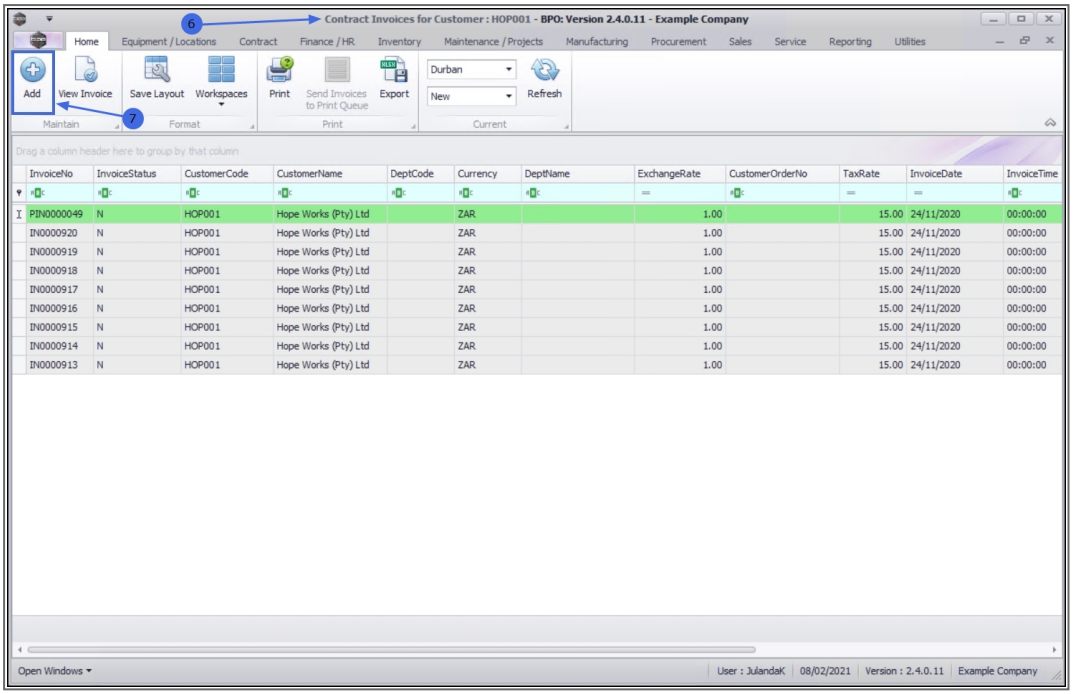

8. The ***Maintain Contract Invoice: Add a new invoice*** screen will display.
9. Complete the ***Contract Invoice Header*** Information.
10. The ***Item Fees Grid*** and ***Meter Fees Grid*** will automatically update with the item(s) and meter(s) details that have originally been set up on the **selected contract**.

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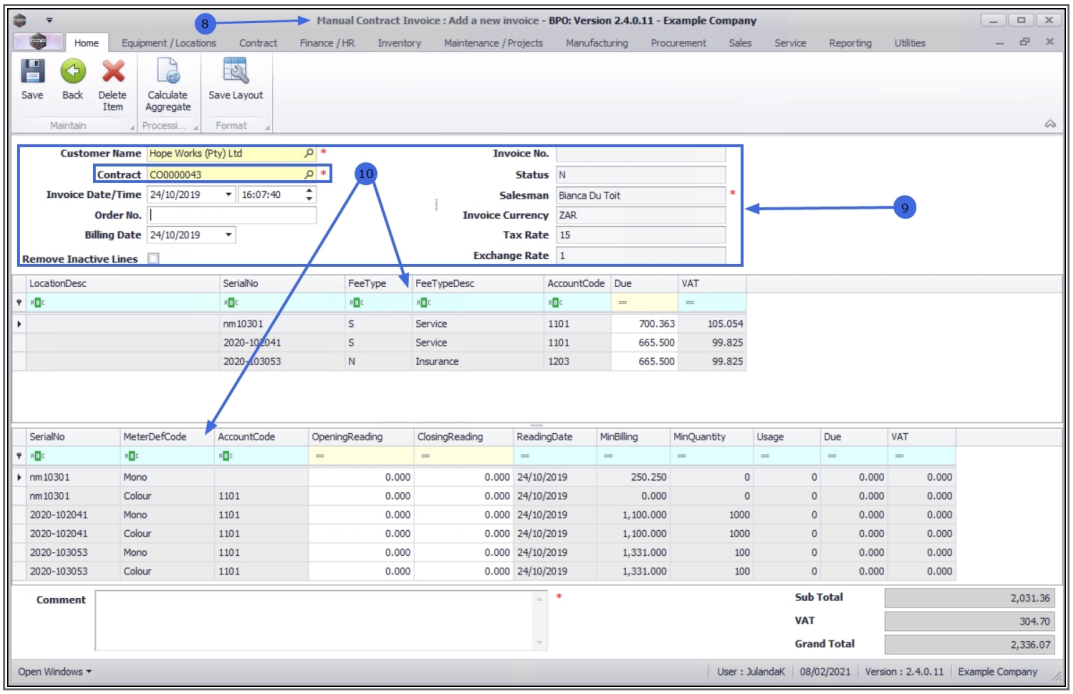

11. Ensure that the correct ***Fee and Meter charges*** have been listed.
12. **Delete** any items that you do not wish to bill, by selecting the ***row*** of the item and clicking on the ***Delete Item*** button.
13. Type in a ***Comments*** relevant to this Contract Invoice.

> Note that this field is mandatory.

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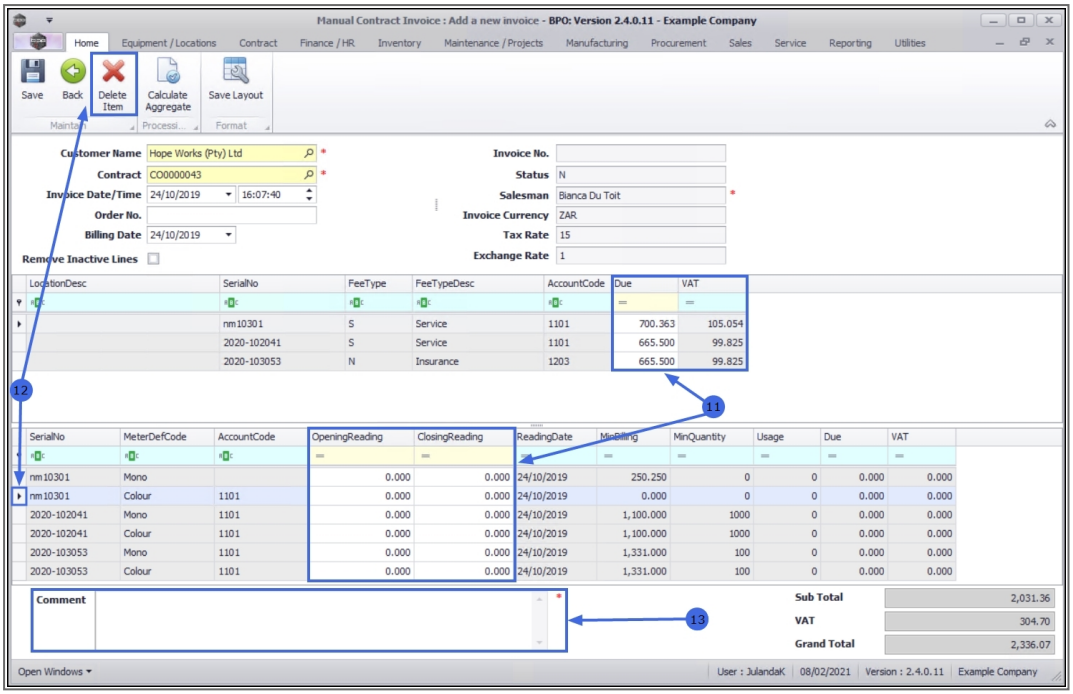

AGGREGATE BILLING

14. Click on ***Calculate Aggregate*** to recalculate the aggregate billing charge. The correct amount will be billed regardless, but this will give you the ability to view the charges before saving the manual Contract Invoice.

> A contract cannot be configured for Aggregate Billing where the customer is consolidated.

15. Click on ***Save*** to save the new Manual Contract and to return to the ***Contract Invoices for Customer*** screen.

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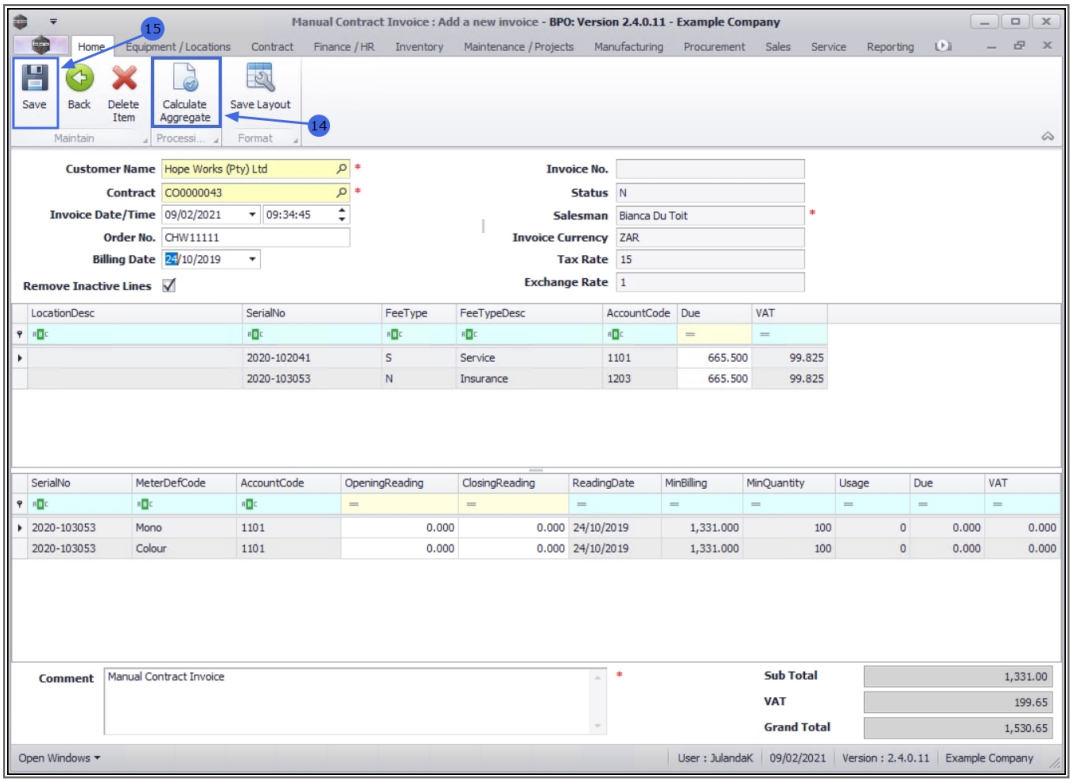

COMMENT AND ORDER

The comment and order number will appear on the Contract Invoice.

1. From the ***Contract Invoices for Customer : [****customer name****]*** screen,
2. Ensure that the correct ***Site*** has been selected.
    - The example has ***Durban*** selected.
3. Select the ***Status*** of the contract invoice.
    - The example has ***New*** selected.
4. Click on the ***row*** of the Invoice you would like to add a comment and order number to.
5. Click on ***Comment and Order***.

> **Short cut key:** ***Right click*** to display the ***Process*** menu list. Click on ***Comments and References***.

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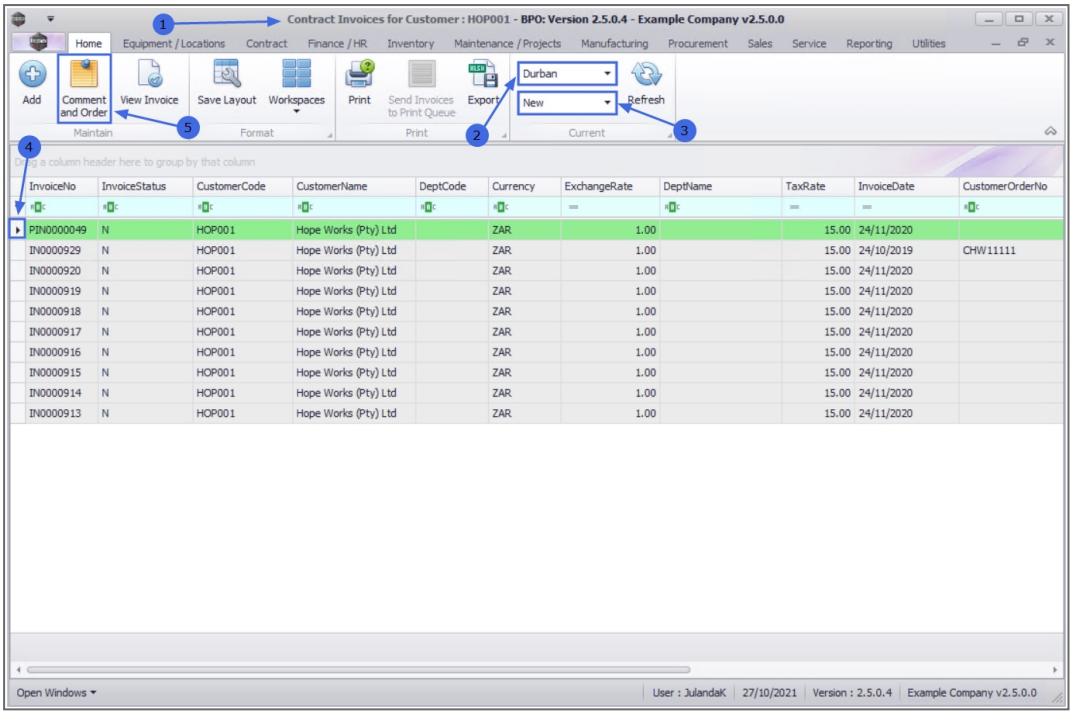

6. The ***Note maintain for Contract Invoice no. - PIN[****invoice number****]*** screen will display.
    - **Order Number:** Type in the order number that has been linked to the contract invoice.
    - **Comments:** Click in the comments text box to start typing a comment for the contract invoice.
7. Click on ***Save***.
8. When you receive the ***Process Validation*** message to confirm that;
    - ***Save Successful***
9. Click on ***OK***.

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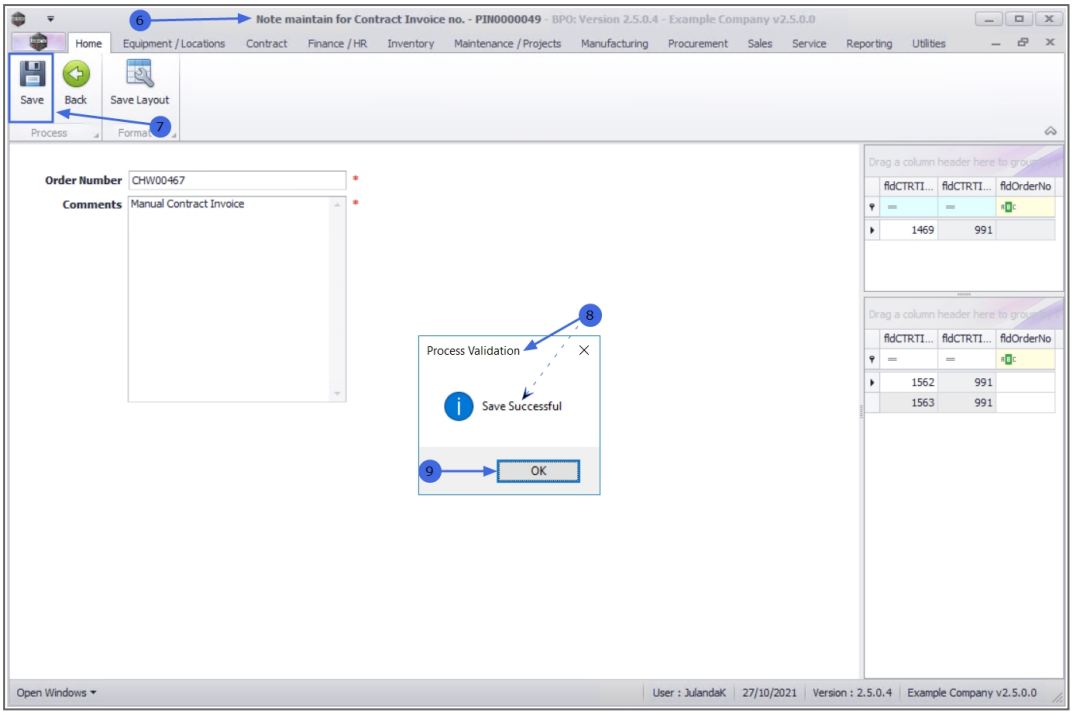

You will return to the ***Contract Invoices for Customer*** screen.

View the contract number and comments on the contract invoice by clicking on ***View Invoice***.

VIEW CONTRACT INVOICE

1. From the ***Contract Invoices for Customer*** *[customer code]* screen.
2. Select the ***row*** of the Contract Invoice you wish to view.
3. Click on ***View Invoice***.

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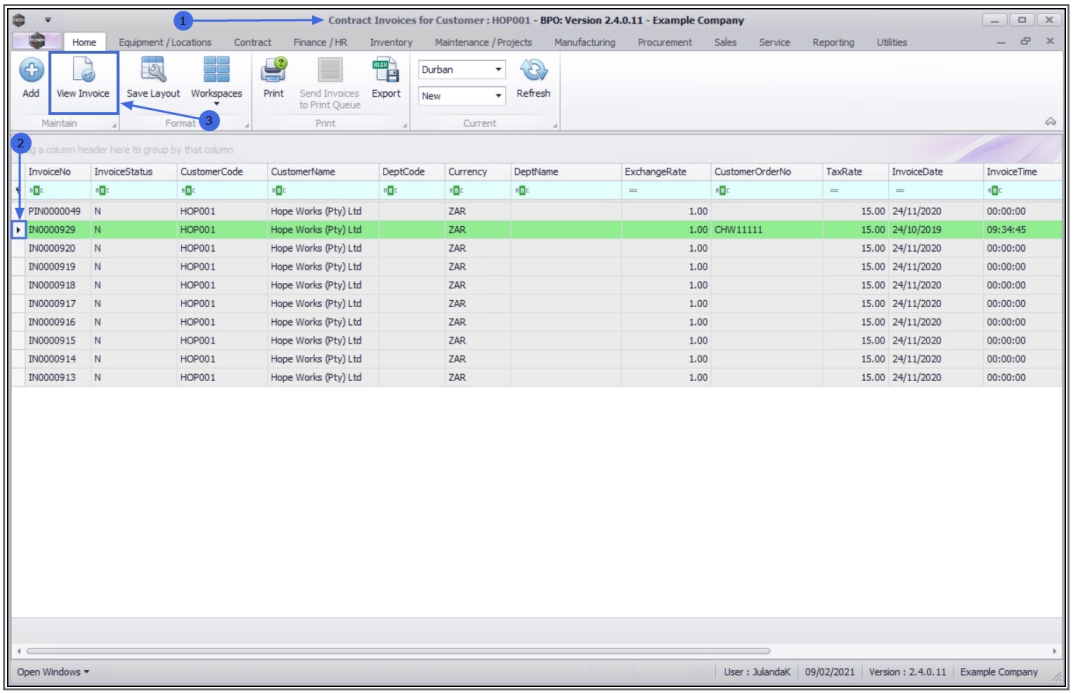

4. The ***Contract Invoice no. - INV[****invoice number****]*** will display.

> Note that this is for viewing the contract invoice only and no changes can be made in this screen.

5. Click on ***Back*** to return to the ***Contract Invoices for Customer*** screen.

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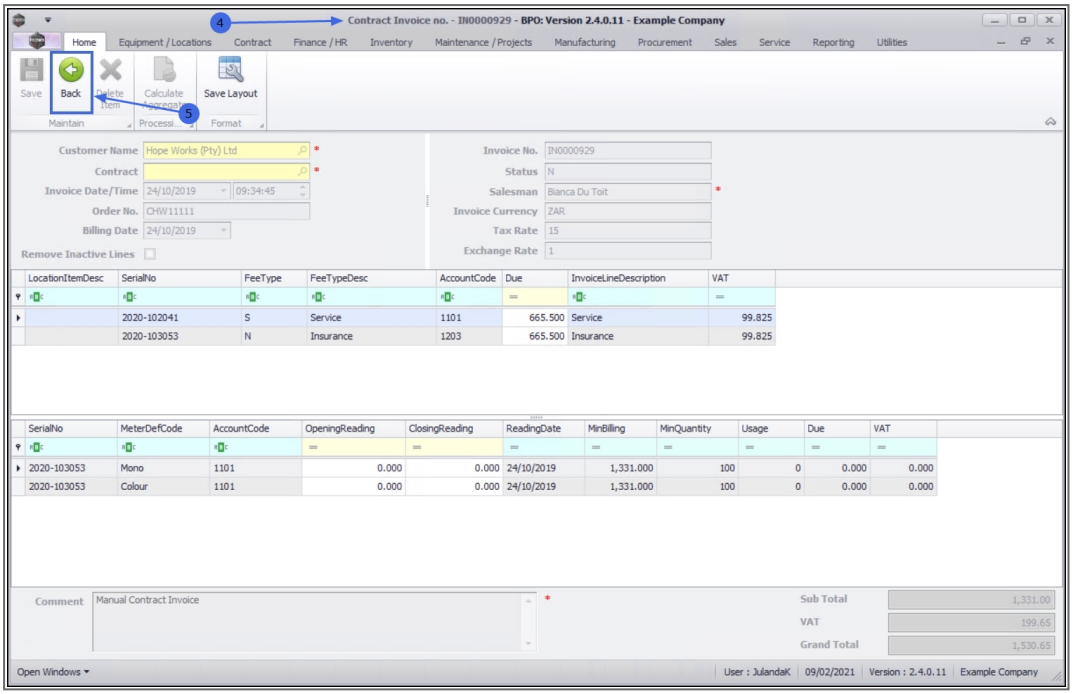

PRINT CONTRACT INVOICES

1. From the ***Contract Invoices for Customer : [****customer code****]*** screen,
2. Select the ***row*** of the Contract Invoice you wish to print.
3. Click on ***Print***.
4. The ***Select the option as desired message*** will display.
5. Click on the ***radio button*** of the option you require.

> When selecting to *Email Invoice*, the invoice will be emailed via the *BPO Email Service* on the server and not from MS Outlook.

   - The example has ***Print Invoice*** selected.
6. Click on ***Accept*** to proceed.

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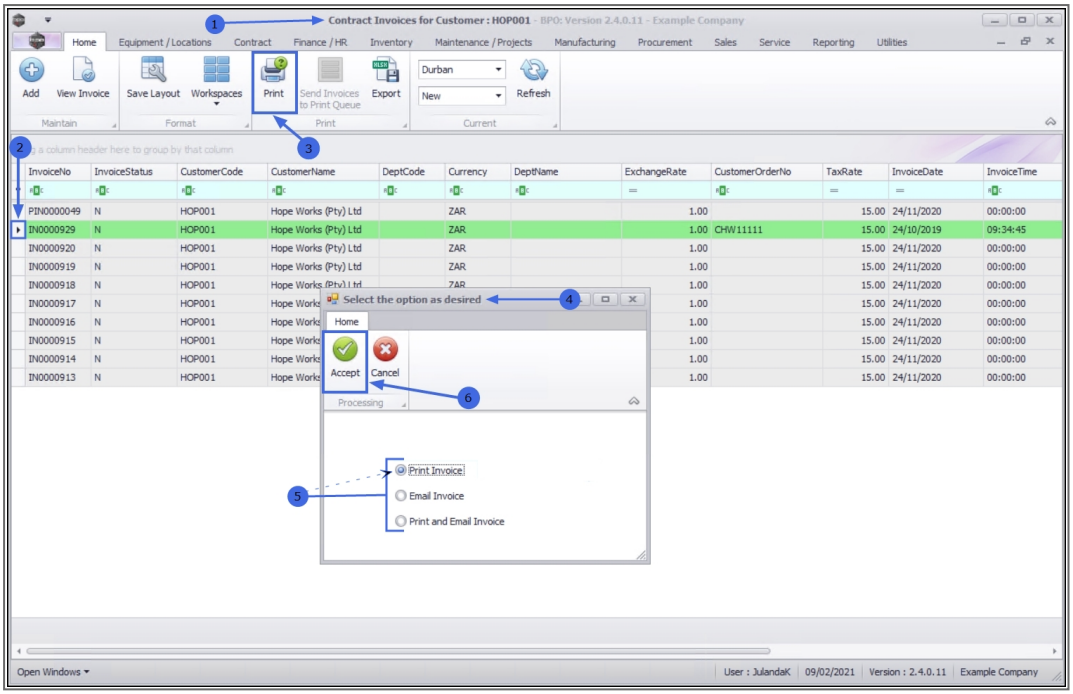
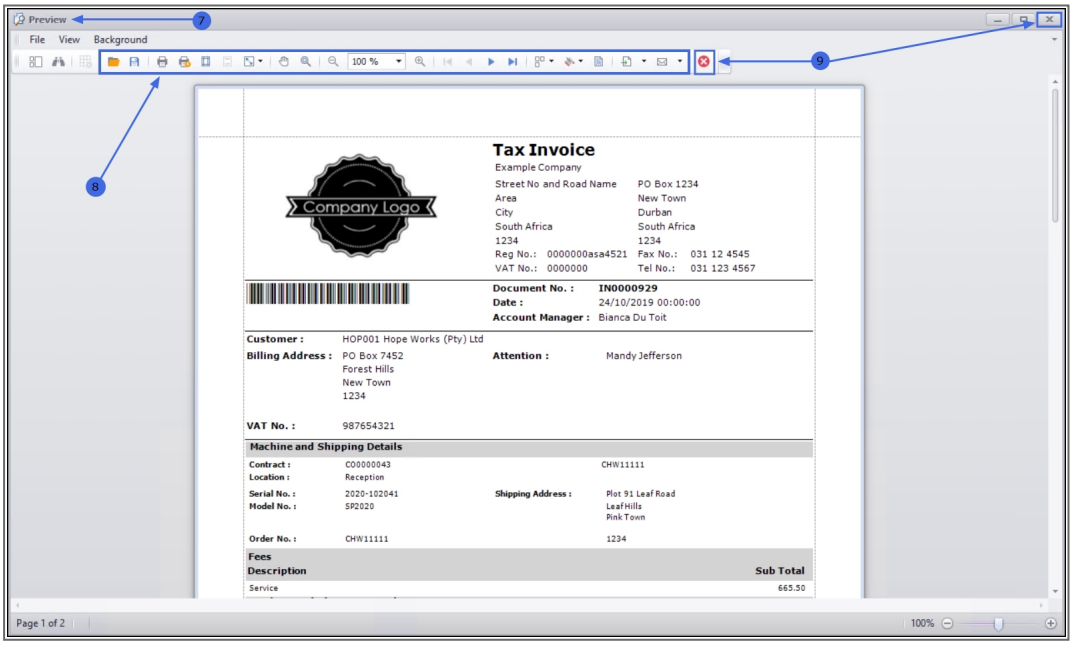


7. The Tax Invoice will display in the ***Preview*** screen.
8. From this screen you can make cosmetic changes to the document, as well as ***Save***, ***Print***, ***Add a Watermark***, ***Export*** or ***Email*** the Invoice.
9. Click on ***Close*** to return to the ***Sales Invoices for Customer*** screen.



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SEND INVOICES TO PRINT QUEUE

You can send Invoices to the Print Queue directly from the ***Contract Invoices for Customer [***customer code***]*** listing screen, instead of going to the Print Queue Reprint screen. This means that a batch of invoices can be send to the customer.

Print Queue is only available where the status is set to **Printed**.

1. From the ***Contract Invoices for Customer : [****customer code****]*** screen,
2. Select the Contract Invoice(s) you wish to send to the Print Queue.
    - **To Select a Range:** Select the ***row*** of the **first invoice**. **Hold** down the **Shift key** on your keyboard and click in the ***row selector*** next to the ***last invoice*** in your list.
    - **To Select alternate Invoices:** Hold down the **Ctrl (Control) key** on your keyboard and click in the ***row*** of each Invoice you wish to include in the Print Queue.
3. Click on ***Send Invoices to Print Queue***.
4. When you receive the ***Print Queue Processing*** message to inform you that;
    - ***The selected items have been sent to the print queue.***
5. Click on ***OK*** to proceed.

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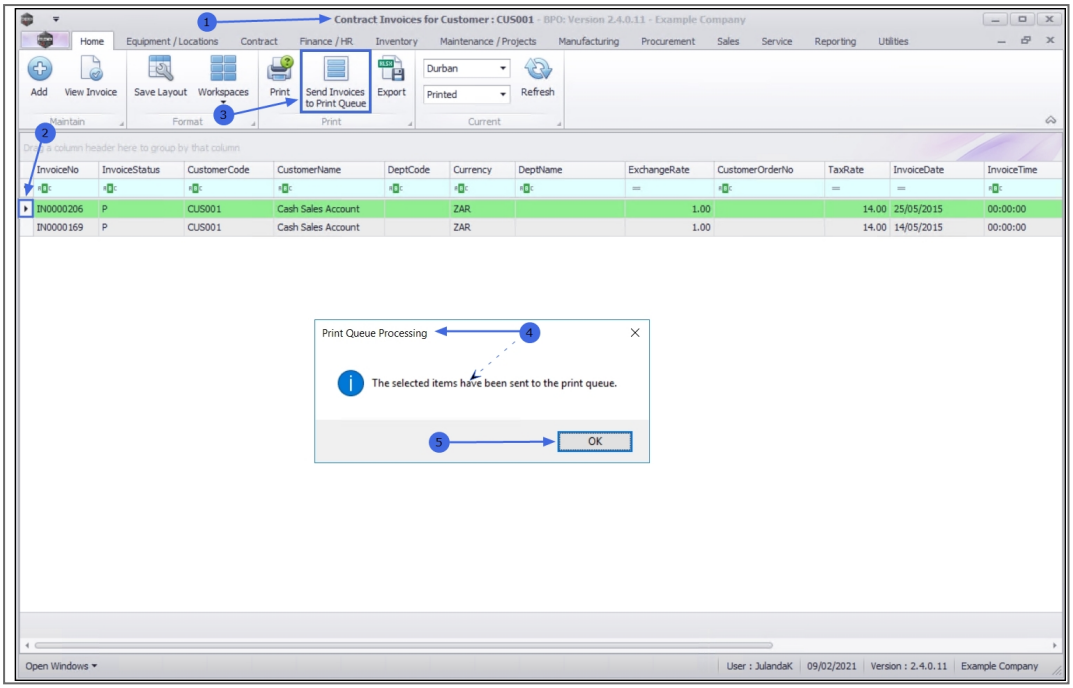

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