

SALES

CUSTOMERS - CONTRACT INVOICES

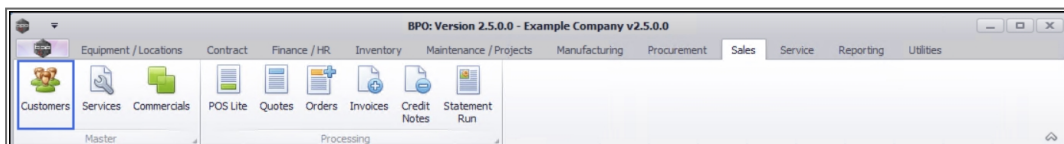
The **Contract Invoices** tile for a Customer allows you to create a manual Contract Invoice, to bill a machine on a contract, for either fees, meters, or both, within the current billing period. This will prevent a contract invoice from being raised at month end for the contract (fees and/or meters).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

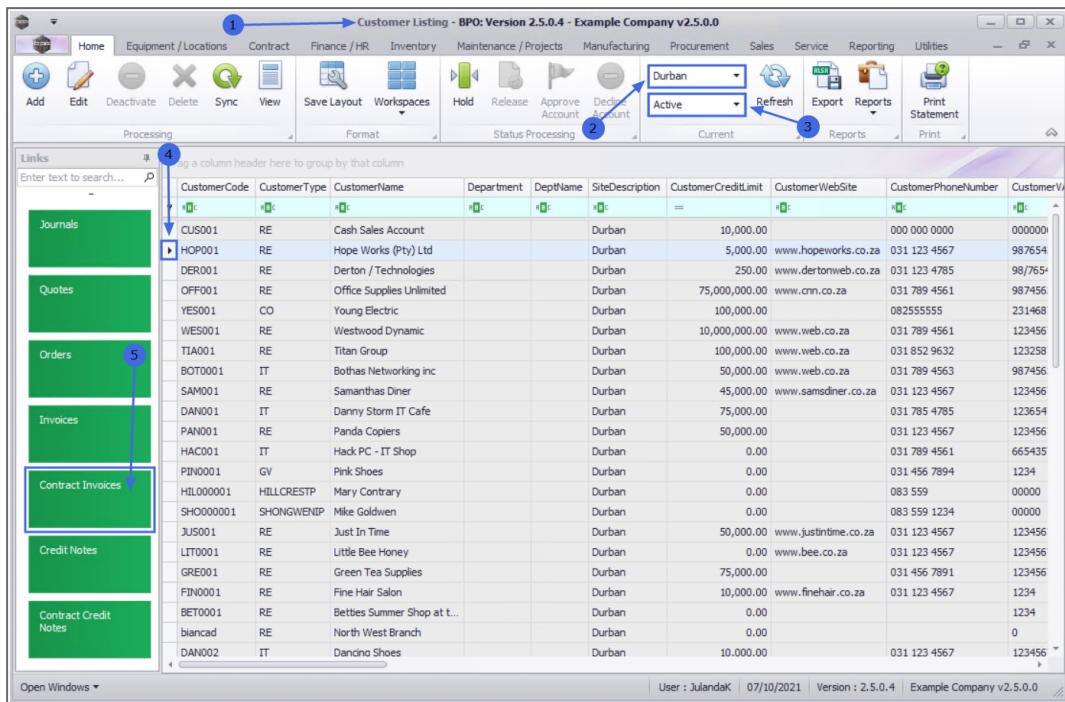
This manual provide a brief outline of the process from the Contract Invoices Tile. [For a detailed handling of this topic refer to Manual Contract Invoice - Unconsolidated Customer](#)

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.

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



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

ADD CONTRACT INVOICE

- Click on **Add**.



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

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**.

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

Customer Name: Hope Works (Pty) Ltd
 Contract: CO0000043
 Invoice No.:
 Status: N
 Salesman: Bianca Du Toit
 Invoice Currency: ZAR
 Tax Rate: 15
 Exchange Rate: 1


LocationDesc	SerialNo	FeeType	FeeTypeDesc	AccountCode	Due	VAT
	rm10301	S	Service	1101	700.363	105.054
	2020-102041	S	Service	1101	665.500	99.825
	2020-103053	N	Insurance	1203	665.500	99.825

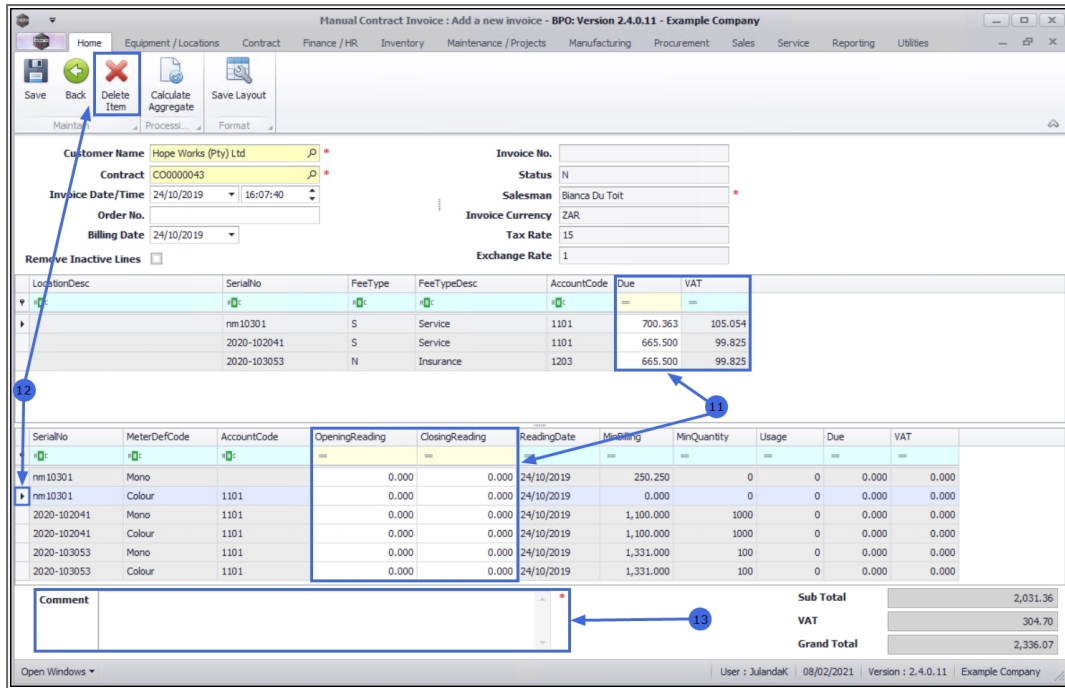
SerialNo	MeterDefCode	AccountCode	OpeningReading	ClosingReading	ReadingDate	MinBilling	MinQuantity	Usage	Due	VAT
rm10301	Mono		0.000	0.000	24/10/2019	250.250		0	0	0.000
rm10301	Colour	1101	0.000	0.000	24/10/2019	0.000		0	0	0.000
2020-102041	Mono	1101	0.000	0.000	24/10/2019	1,100.000	1000	0	0	0.000
2020-102041	Colour	1101	0.000	0.000	24/10/2019	1,100.000	1000	0	0	0.000
2020-103053	Mono	1101	0.000	0.000	24/10/2019	1,331.000	100	0	0	0.000
2020-103053	Colour	1101	0.000	0.000	24/10/2019	1,331.000	100	0	0	0.000

Sub Total: 2,031.36
 VAT: 304.70
 Grand Total: 2,336.07

Comment: [Mandatory field]

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.



AGGREGATE BILLING

- 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.

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

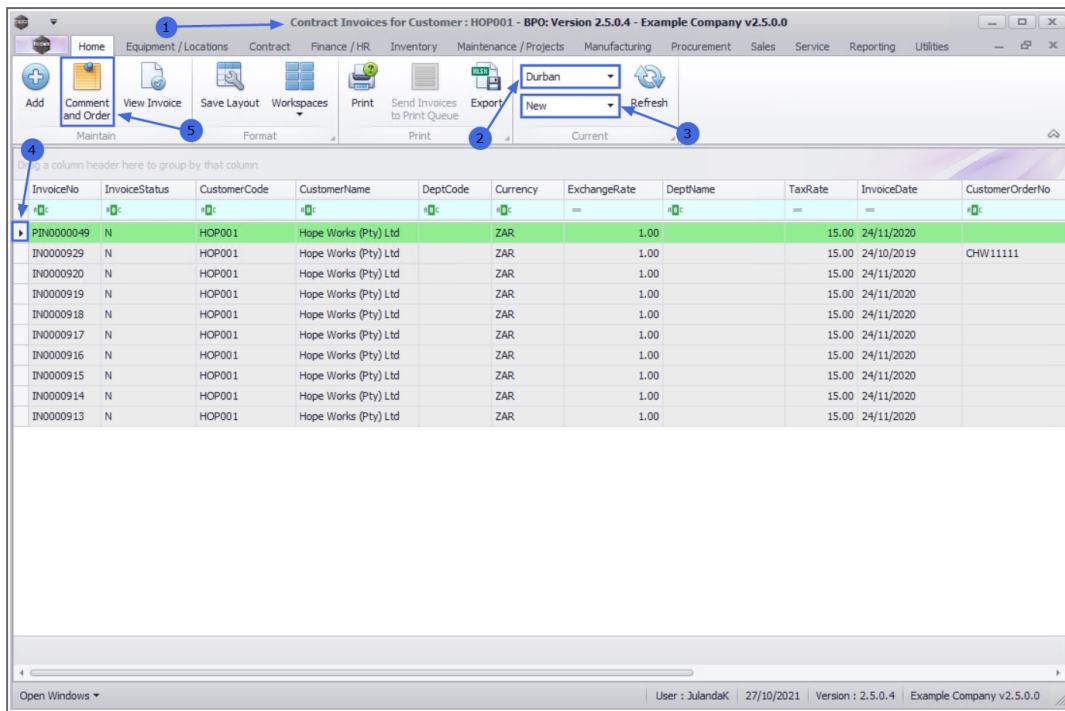
COMMENT AND ORDER

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**.



6. The **Note maintain for Contract Invoice no. - PIN[invoice number]** screen will display.

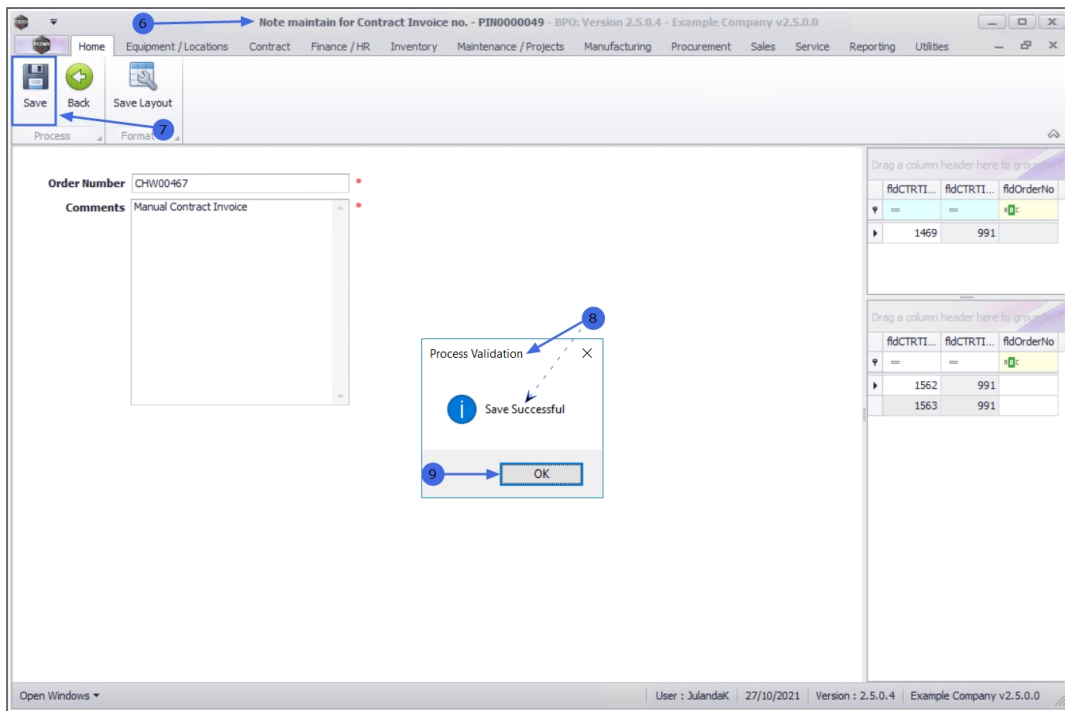
- **Order Number:** Type in the order number that has been linked to the contract invoice.
- **Comments:** Click in the comments text box to start typing a comment for the contract invoice.

7. Click on **Save**.

8. When you receive the **Process Validation** message to confirm that;

- **Save Successful**

9. Click on **OK**.



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**.

InvoiceNo	InvoiceStatus	CustomerCode	CustomerName	DeptCode	Currency	DeptName	ExchangeRate	CustomerOrderNo	TaxRate	InvoiceDate	InvoiceTime
IN0000049	N	HOP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
IN0000929	N	HOP001	Hope Works (Pty) Ltd		ZAR		1.00	CHW11111	15.00	24/10/2019	09:34:45
IN0000920	N	HOP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
IN0000919	N	HOP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
IN0000918	N	HOP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
IN0000917	N	HOP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
IN0000916	N	HOP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
IN0000915	N	HOP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
IN0000914	N	HOP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
IN0000913	N	HOP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00

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.

Contract Invoice no. - JH0000929 - BPO: Version 2.4.0.11 - Example Company

Customer Name: Hope Works (Pty) Ltd
 Invoice No.: JH0000929
 Status: N
 Salesman: Bianca Du Toit
 Invoice Currency: ZAR
 Tax Rate: 15
 Exchange Rate: 1

Location/Item Desc	SerialNo	FeeType	FeeTypeDesc	AccountCode	Due	InvoiceLineDescription	VAT
2020-102041		S	Service	1101	665.500	Service	99.825
2020-103053		N	Insurance	1203	665.500	Insurance	99.825

SerialNo	MeterDefCode	AccountCode	OpeningReading	ClosingReading	ReadingDate	MinBilling	MinQuantity	Usage	Due	VAT
2020-103053	Mono	1101	0.000	0.000	24/10/2019	1,331.000		100	0	0.000
2020-103053	Colour	1101	0.000	0.000	24/10/2019	1,331.000		100	0	0.000

Comment: Manual Contract Invoice

Sub Total: 1,331.00
 VAT: 199.65
 Grand Total: 1,530.65

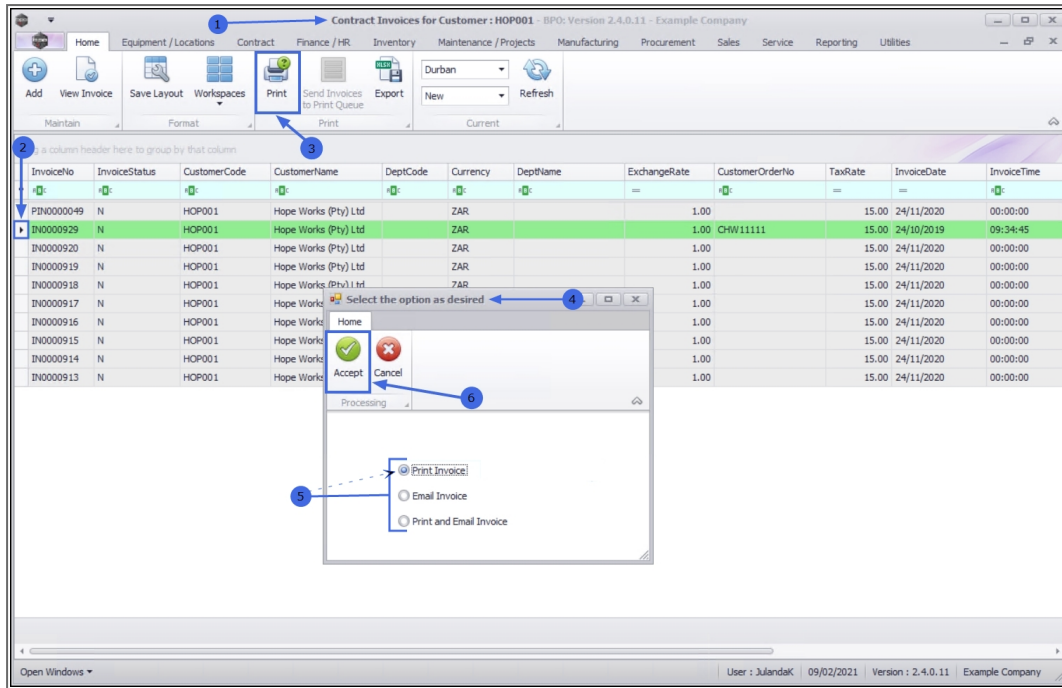
PRINT CONTRACT INVOICES

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.

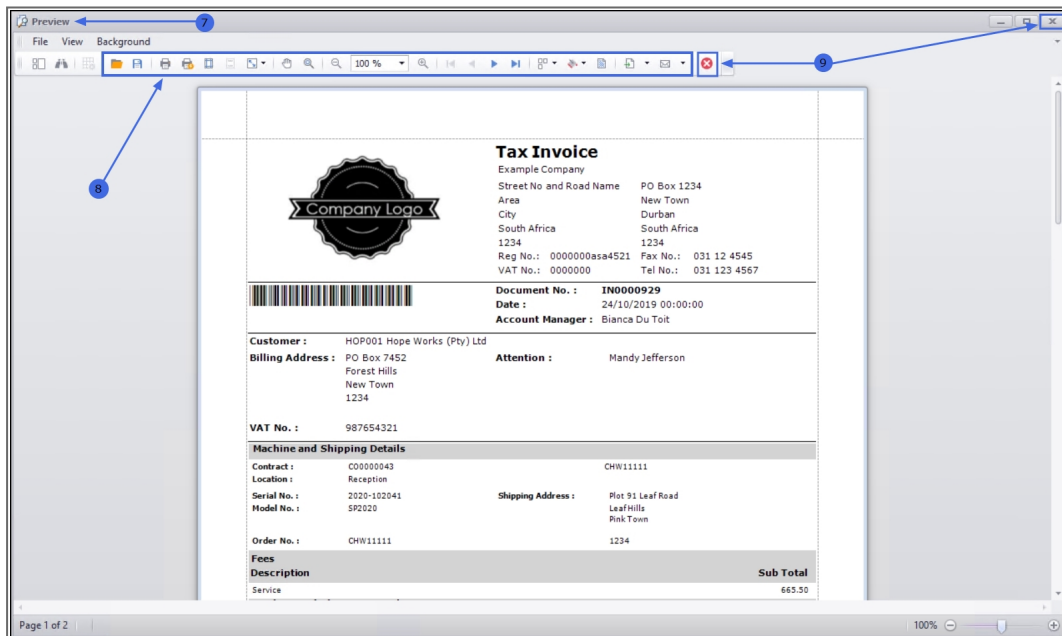


When selecting to **Email Invoice**, the invoice will be emailed via the **BPO Email Service** on the server and not from MS Outlook.

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





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.



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.

The screenshot displays the 'Contract Invoices for Customer: CUS001' window. The interface includes a menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with buttons for Add, View Invoice, Save Layout, Workspaces, Print, Send Invoices to Print Queue, Export, and Refresh. A table of invoices is shown with columns: InvoiceNo, InvoiceStatus, CustomerCode, CustomerName, DeptCode, Currency, DeptName, ExchangeRate, CustomerOrderNo, TaxRate, InvoiceDate, and InvoiceTime. Two rows are visible: IN0000206 (P) and IN0000169 (P), both for customer CUS001 and 'Cash Sales Account' in ZAR. A 'Print Queue Processing' dialog box is open, displaying the message 'The selected items have been sent to the print queue.' and an 'OK' button.

InvoiceNo	InvoiceStatus	CustomerCode	CustomerName	DeptCode	Currency	DeptName	ExchangeRate	CustomerOrderNo	TaxRate	InvoiceDate	InvoiceTime
IN0000206	P	CUS001	Cash Sales Account		ZAR		1.00		14.00	25/05/2015	00:00:00
IN0000169	P	CUS001	Cash Sales Account		ZAR		1.00		14.00	14/05/2015	00:00:00

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