


We are currently updating our site; thank you for your patience.

SALES

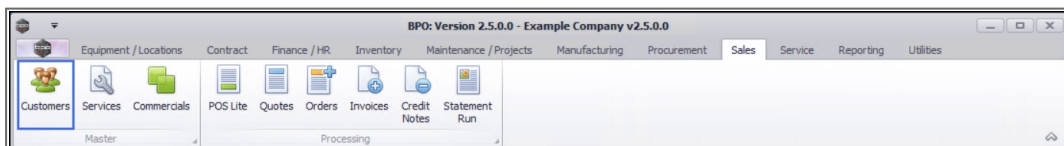
CUSTOMERS – CONTRACT INVOICES

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.

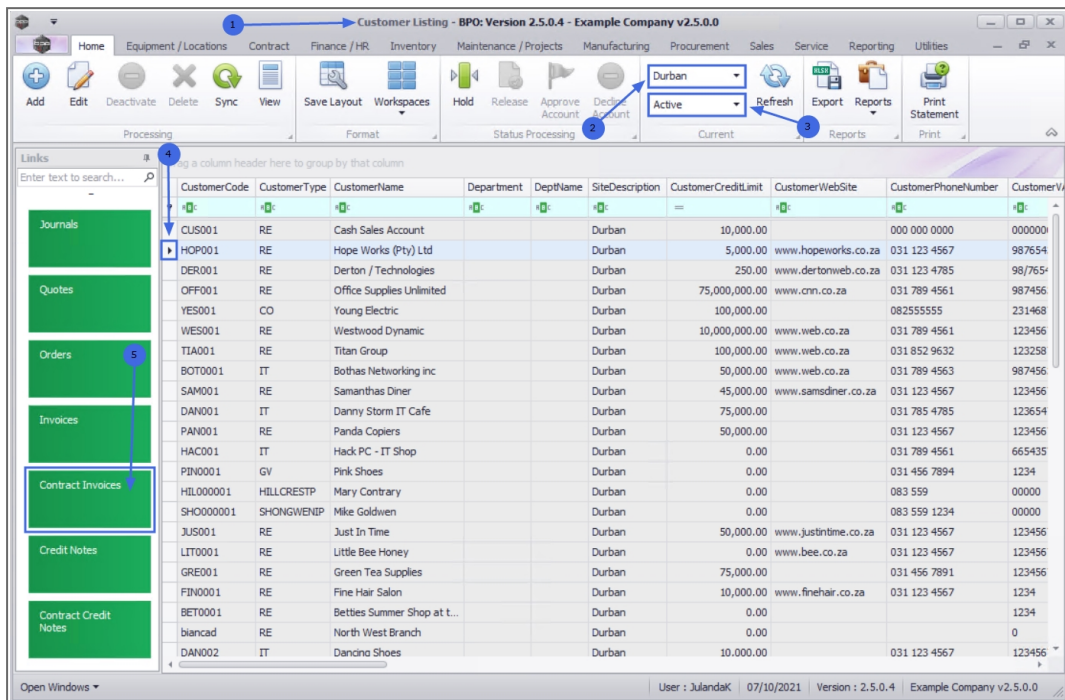
This manual provide a brief outline of the process from the Contract Invoices Tile. [For a detailed handling of this topic refer to Manual Contract Invoice - Unconsolidated Customer](#)

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**.

Contract Invoices for Customer : HOP001 - BPO: Version 2.4.0.11 - Example Company

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

Drag a column header here to group by that column

InvoiceNo	InvoiceStatus	CustomerCode	CustomerName	DeptCode	Currency	DeptName	ExchangeRate	CustomerOrderNo	TaxRate	InvoiceDate	InvoiceTime
I PIN0000049	N	HOP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
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

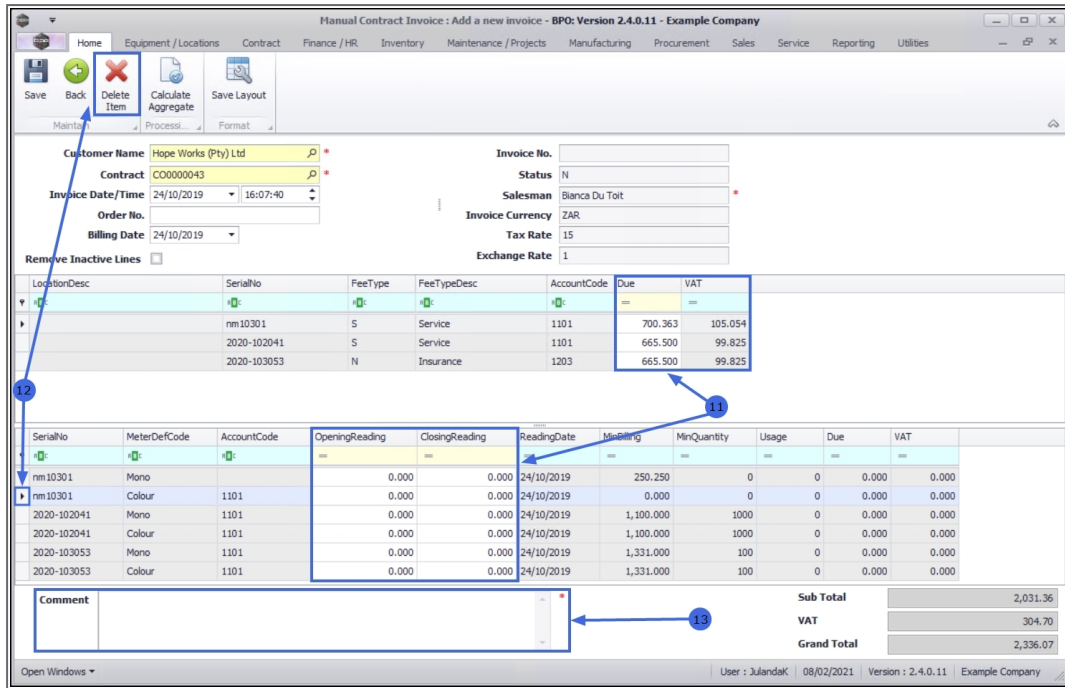
Open Windows | User : JulandaK | 08/02/2021 | Version : 2.4.0.11 | Example Company

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**.

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.

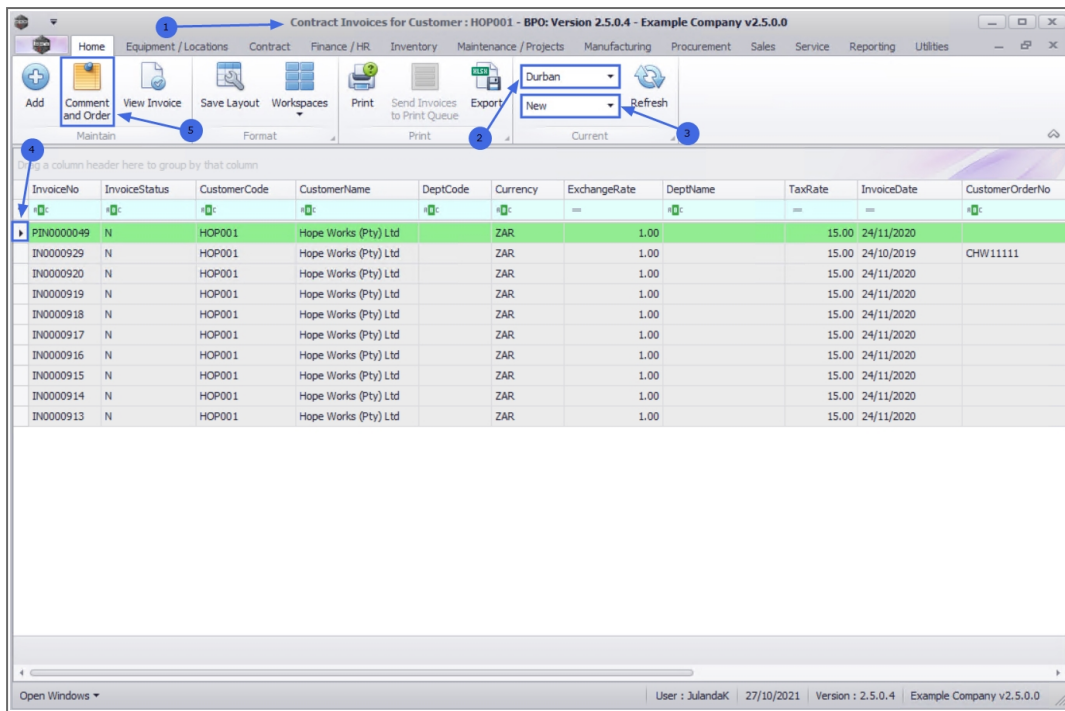
COMMENT AND ORDER

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.

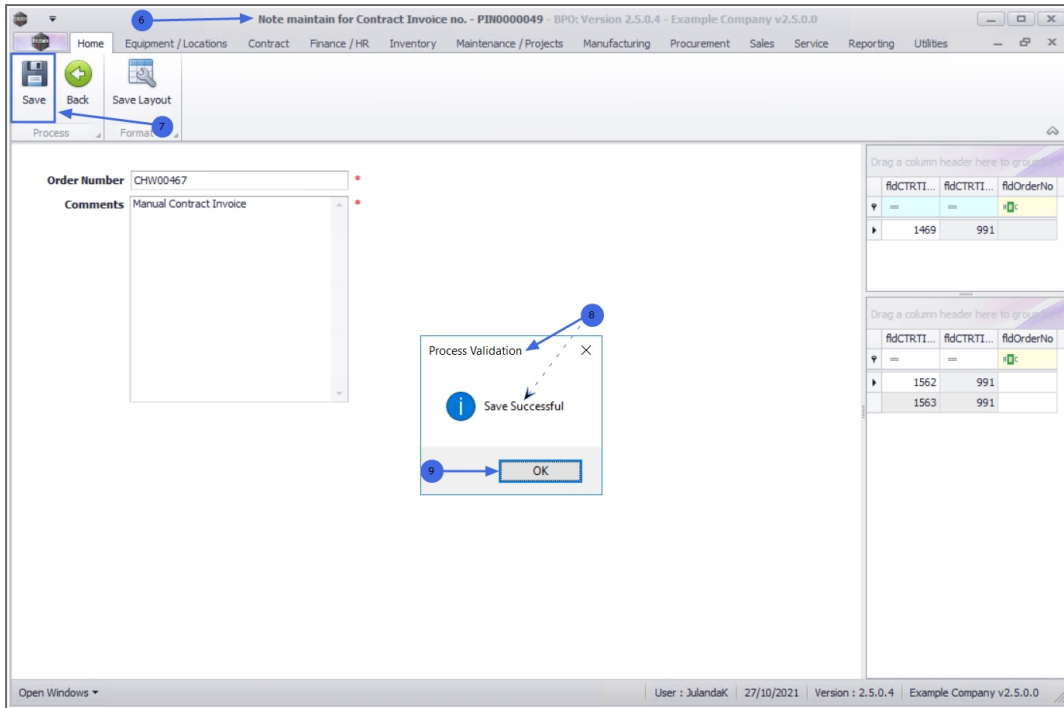
- **Order Number:** Type in the order number that has been linked to the contract invoice.
- **Comments:** Click in the comments text box to start typing a comment for the contract invoice.

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**.

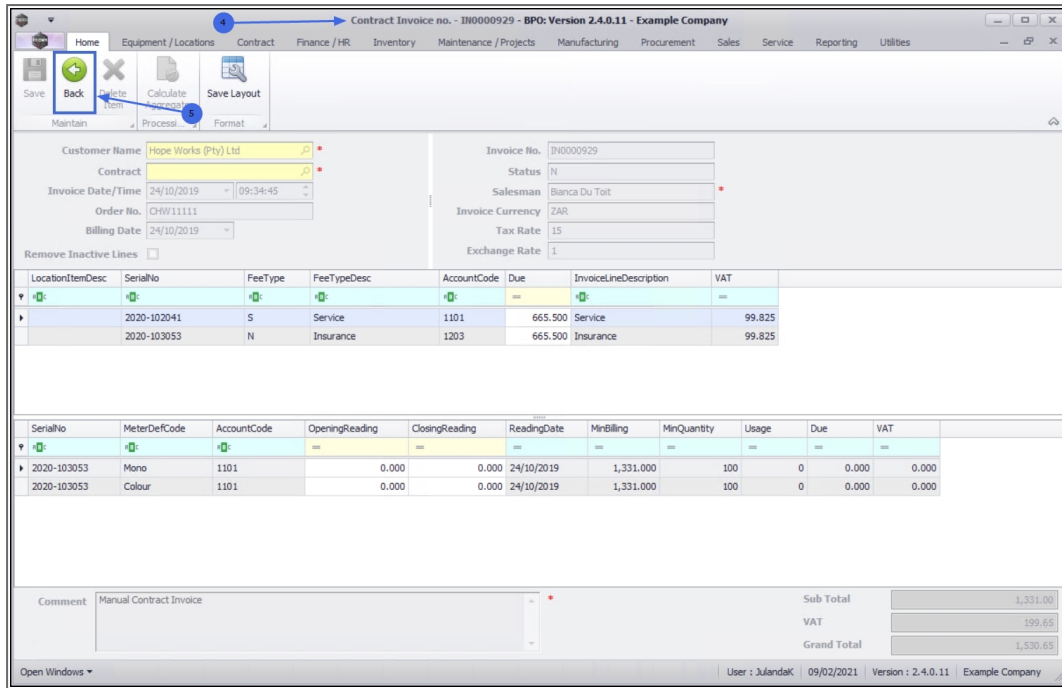
InvoiceNo	InvoiceStatus	CustomerCode	CustomerName	DeptCode	Currency	DeptName	ExchangeRate	CustomerOrderNo	TaxRate	InvoiceDate	InvoiceTime
INV000049	N	HQP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
INV000929	N	HQP001	Hope Works (Pty) Ltd		ZAR		1.00	CHW11111	15.00	24/10/2019	09:34:45
INV000920	N	HQP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
INV000919	N	HQP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
INV000918	N	HQP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
INV000917	N	HQP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
INV000916	N	HQP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
INV000915	N	HQP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
INV000914	N	HQP001	Hope Works (Pty) Ltd		ZAR		1.00		15.00	24/11/2020	00:00:00
INV000913	N	HQP001	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.



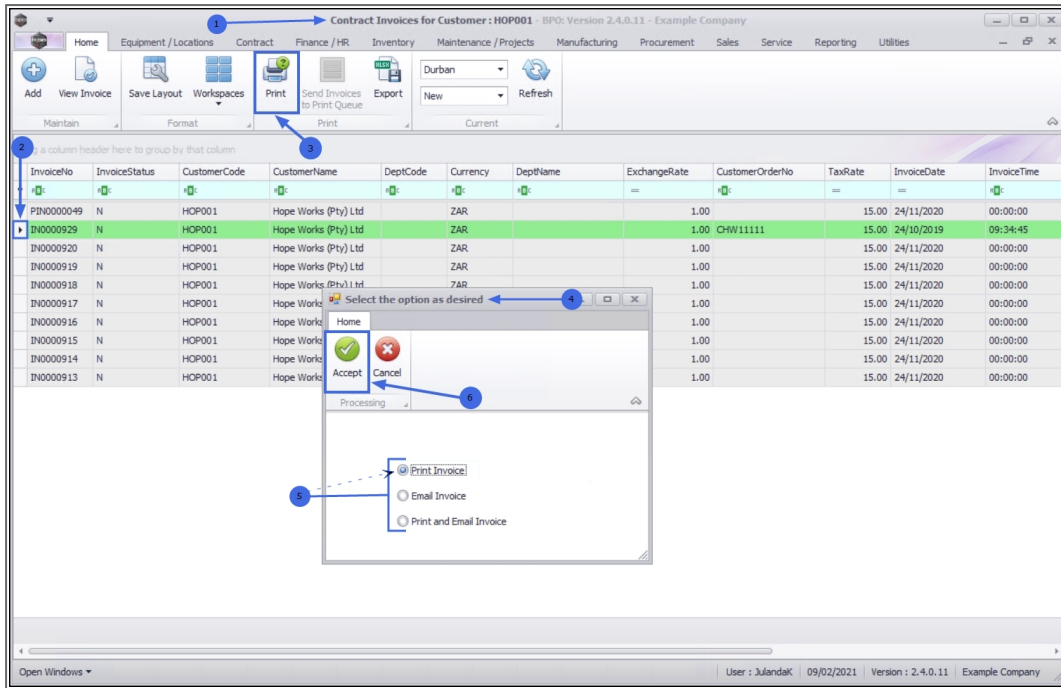
PRINT CONTRACT INVOICES

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.

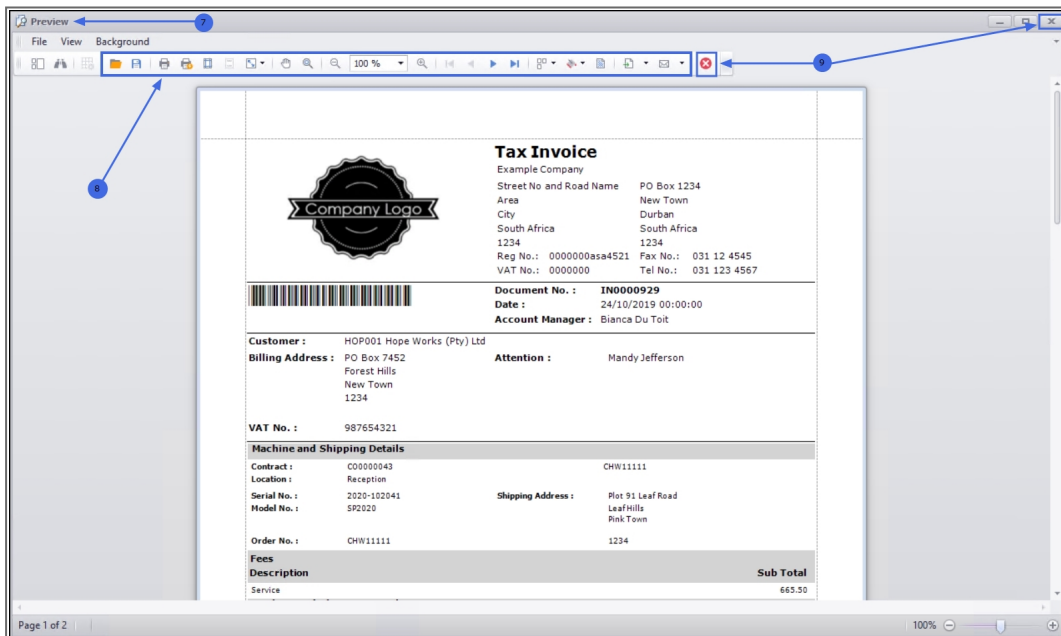


When selecting to **Email Invoice**, the invoice will be emailed via the **BPO Email Service** on the server and not from MS Outlook.

- 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.

Contract Invoices for Customer: CUS001

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

Print Queue Processing

1 The selected items have been sent to the print queue.

OK

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