

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.

Let 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.



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

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	GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456
	FIN0001	RE	Fine Hair Salon			Durban	10,000.00	www.finehair.co.za	031 123 4567	1234
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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**.



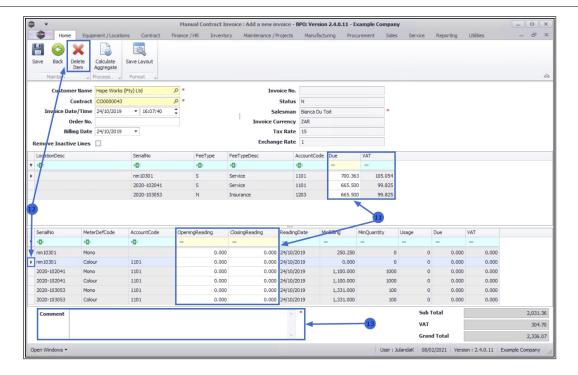
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- 11. Ensure that the correct **Fee and Meter charges** have been listed.
- 12. **Delete** any items that you do not wish to bill, by selecting the **row** of the item and clicking on the **Delete Item** button.
- 13. Type in a **Comments** relevant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



Customers - Contract Invoices

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		IN0000914											
		IN0000913	N	HOP001	Hope Works (Ptv) 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 <u>no</u> changes can be made in this screen.

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



1 V													
		4	Contract	Invoice no IN00009	29 - BPO: V	ersion 2.4.0.11 - Exar	nple Company						
Home	Equipment / Loca	tions Contract	Finance / HR Inven	tory Maintenance / F	rojects	Manufacturing Proc	curement Sal	es Servio	e Rep	orting	Utilities		- 8
	X B	27											
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	2020-102041	s	Service	1101	665.5	00 Service		99.825					
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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.

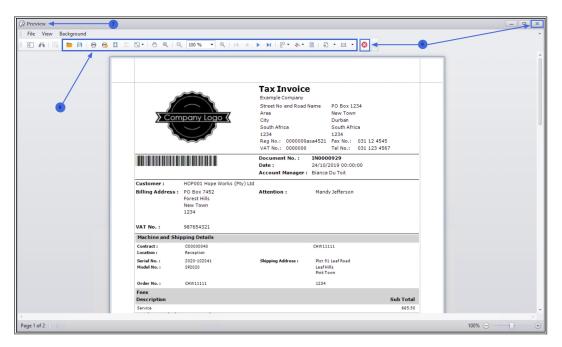
When selecting to Email Invoice, the invoice will be emailed via the BPO Email Service on the server and not from MS Outlook.

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



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Add	View Inv			P		Maintenance / Pro Durban • New •	Nefresh	g Procureme	nt	Sales Service	Reporting U	tilities	- 8	×
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	piceNo	InvoiceStatus	CustomerCode	CustomerName	DeptCode	Currency	DeptName	ExchangeRat	e	CustomerOrderNo	TaxRate	InvoiceDate	InvoiceTime	
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Dpen \	Windows -									User : JulandaK	09/02/2021 Ver	sion : 2.4.0.11	Example Company	

- 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

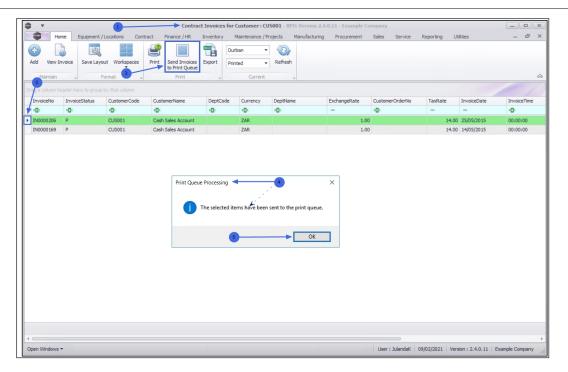
You can send Invoices to the Print Queue directly from the **Contract Invoices for Customer** [customer code] listing screen, instead of going to the Print Queue Reprint screen. This means that a batch of invoices can be send to the customer.

Print Queue is <u>only</u> 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.



Customers - Contract Invoices



MNU.061.035

Help v2024.5.0.7/1.0 - Pg 13 - Printed: 04/07/2024

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