

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

# CONTRACT

# **AUTO BILL FLAG SELECTED**

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 <u>un</u>selected in the Configurator, when the contract billing batch is created and saved, the contract invoices will be <u>not</u> be created by the system. Refer to Contract Billing - Auto Bill flag unselected.

The process set out below depends on the Auto Bill flag being <u>selected</u> in the Configurator. The contract invoices will be auto-created on running the billing batch. The **Invoices** action button will be <u>inactive</u> in the Contract Billing screen throughout this whole process.

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**

- 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 invoices.
- 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** configured on 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 contract that you wish to bill currently.



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#### **ALL CONTRACTS CHECK BOX**

- 1. <u>All</u> contracts are initially selected by default,
- 2. unless the **Billing Day** is selected.
- 3. Use the select **All Contracts** 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.
- <u>All</u> Contract Types are initially selected by default. **Deselect** individual Contract Types that you do <u>not</u> wish to bill at this time.



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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 Fee Types are initially selected by default.</u>
- 4. <u>Deselect</u> any Fee Type(s) that you do <u>not</u> wish to bill at this time.



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## THE 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 'quick' <u>deselect</u> 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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#### SAVE BILLING BATCH AND CREATE INVOICES

Once you have selected the:

- 1. Contract Types,
- 2. Contracts and
- 3. Fee Types that you wish to bill,
- 4. Click on Save.
- 5. Note: At this point, the **Invoice** action button is still <u>inactive</u> (greyed out).



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- 1. A Check Billing Batch Creation message box will pop up, asking;
  - $^\circ~$  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 **Run Billing** message box will pop up informing you that:
  - The invoicing has been run successfully.
- 2. Click on OK.



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The screen will refresh:

- 1. The list of **contracts** will be auto selected.
- 2. The Select All Contracts check box 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 Remains Inactive**

 Note: The Invoice action button remains <u>inactive</u> (greyed out) as the contract invoices have been <u>auto-created</u> by the system as a result of the Auto Bill flag in the Configurator being ticked.



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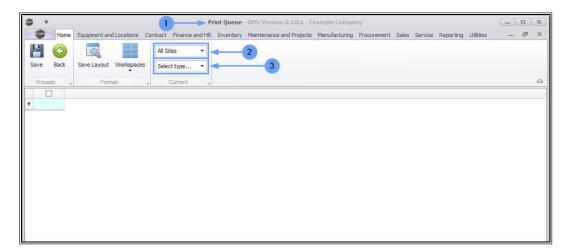
#### **VIEW AUTO-CREATED INVOICES IN PRINT QUEUE**

- 1. To view the auto-created invoices select the **Utilities** tab.
- 2. In the Utilities toolbar, select Print Queue.



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- 1. The **Print Queue** screen will open.
- 2. Select the **Site** that you initiated the contract billing from.
- 3. Set the **Type** to Contract Invoices.

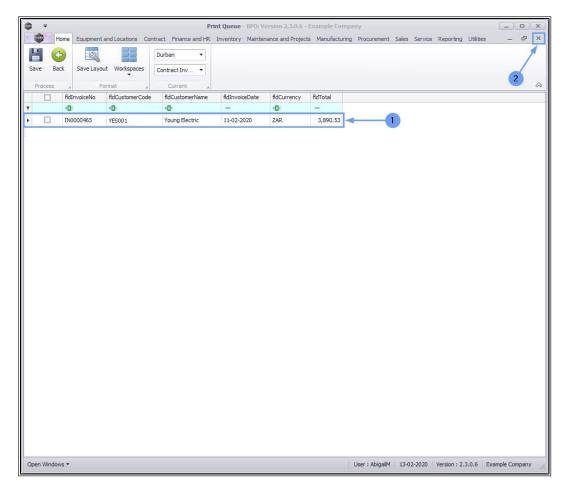




- 1. The data grid will refresh to display the **Contract Invoice(s)** that were auto-raised when you created the billing batch in the Contract Billing screen.
- 2. Close the screen when you are done.

For more information regarding the functionality of this screen, refer to Print

Queue.



MNU.117.001