

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

# CONTRACT

# SHORT TERM CONTRACT - INVOICE

A **Short Term Contract Invoice** is created at the end of the contract. (Multiple invoices can be raised, if for example, the contract is extended).

**Important Note**: Remember to **subtract** the deposit amount from the invoice total, if applicable.

**Ribbon Access:** Contract > Short Term Contracts



- The Short Term Contract Listing screen will be displayed.
- Ensure that you have selected the correct **site** and that the **status** is set to **Active**.



### Short Term Contract - Invoice

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# **SELECT THE CONTRACT**

• Select the **row** of the **short term contract** where you wish to raise an invoice.

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#### • Click on Short Term Invoice.

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### **CLOSURE INVOICE DETAILS**

The Closure Invoice for Contract no. [] screen will be displayed.

- **Customer Name:** This will auto populate with the name configured on the contract.
- **Contract:** This is un-editable in this screen but the contract number will pull across on the printed invoice.
- **Invoice Date/Time:** This will auto populate with the current date and time.
  - Date: You can either type in click on the drop-down arrow and use the calendar function to select an alternative date if required.
  - **Time:** You can either type in or use the arrow indicators to select an alternative time if required.
- **Order No:** This will auto populate with the reference no. set up on the contract.
- **Billing Date:** This will auto populate with the billing date set up on the contract. You can click on the drop-down arrow and select an alternative date if required.



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- **Invoice No:** The system will create an invoice number based on the contract type configuration.
- **Status:** This will be set to **N** New.



- **Salesman:** This will auto populate with the person originally set up on this contract.
- **Currency:** This will auto populate with the currency set up on the customer.
- **Tax Rate:** This will auto populate with the tax rate set up on the customer.
- Exchange Rate: This will auto populate with the exchange rate set up in the system.



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#### THE FEES FRAME

This frame will auto populate with the details of the fees configured on the contract.

1. If a **deposit** was paid for this contract, **subtract** this deposit amount from the total in the **Due** column.

#### CHECK DEPOSIT AMOUNT TO DEDUCT FROM INVOICE

 If you need to check the amount of the deposit, click on Back to return to the Short Term Contract Listing screen.



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# **PRINT DEPOSIT INVOICE**

- Click on the **row selector** in front of the **relevant contract**.
- Click on the drop-down **arrow** on the **Print** button.

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• Select from the drop-down list, the **Print Invoice - Ref [ ]** option.

- A Select the option as desired screen will pop up.
- Click on the radio button in front of Print Invoice.



#### • Click on Accept.

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The **Report Preview** screen will be displayed.



- 1. In this image, you can see that this is the **Short Term Contract Deposit Invoice** and that the **Total deposit amount** is R1150.00.
- 2. Close the report preview screen when you having finished viewing it.



# **RETURN TO 'CLOSURE INVOICE' SCREEN**

- You will return to the Short Term Contract Listing screen.
- Click on the **Open Windows** tab at the foot of this screen.



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- A list of all the windows **currently open** in BPO2 will display.
- Select the **Closure Invoice for Contract no.** [] option to take you back to the Closure Invoice screen that you were working in.



# Short Term Contract - Invoice

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STCO	000022	ST	ShortTer	m Contracts	BPO_RSI	ABCXYZ123	ABC SHoe Co					fdg	26 Jun 2017	03 JJ 2017	1	W	We
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# **DEDUCT DEPOSIT AMOUNT**

- Now that the deposit amount has been confirmed, it can be deducted from the Fees Due column.
- In this image, the fees due were R1500 minus the deposit of R1150 gives a total of R350 still owing on the fees.
  - 1. Change the amount in the **Due** column accordingly.
  - 2. You will note that the **Sub Total**, **VAT** and **Grand Total** amounts will auto calculate to accommodate the new figures.



po	1				Closure	Invoice for Contra	ict no. \$1000	00029 - BPQ: W	rsion 2.1.0.62	- Example	Company				8	Ц.	. X
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### THE METER FEES FRAME

#### **CLOSE READINGS**

• In this frame, click in each meter **Closing Reading** field and either type in or use the arrow indicators to select the correct reading.

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- 1. As you **update** the meter readings,
- 2. the Usage, Due and VAT columns will update,
- 3. as will the Sub Total, VAT and Grand Total amounts.



00	•				Closur	e Invoice for Cont	ract no.	21C0000029 - BPO: VE	rsion 2.1.0.62 ·	- Example (	ompany				5	ш	
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# **INVOICE COMMENT**

When you have checked that **all** charge amounts are correct,



1. Type in a **comment** relevant to this Short Term Invoice. (This field is mandatory).

# SAVE SHORT TERM INVOICE

2. Click on **Save**.

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(CO	Č.,				0	osure inv	voice for Contra	ict no. 31	10000029 - 6PO: Ve	rsion 2.1.0.62	- Example	Company				5	Ц	. 1
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• The Short Term Invoice will be **saved** and you will return to the **Short Term Contract Listing** screen.



### **PRINT INVOICE**

- Ensure that the **row selector** is in front of the **contract** that you raised the invoice for.
- Click on the **drop-down arrow** on the **Print** button.



### Short Term Contract - Invoice

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- Select from the list, the **Print Invoice Ref STI[]** option.
  - Note: You will be able to differentiate from the



Deposit Invoice option by the **reference number** of the invoice.

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- The Select the option as desired pop up screen will appear.
- Click on **Print Invoice**.
- Click on Accept.

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- The Report Preview screen will be displayed.
- When you have finished viewing the invoice, **close** the screen.



MNU.158.003