



In Core-CT 9.1 invoices are created using XML format. This offers several advantages over the invoice format used in Core-CT 8.9. Each of these advantages is discussed below.

Automatically send a PDF Invoice during Invoice generation

In Core-CT 9.1 a pdf of an invoice can be sent directly to customers via email as part of the **Finalize and Print Invoices** and **Reprint Invoices** processes.

Navigation

Billing > Generate Invoices > Non-Consolidated > Finalize and Print Invoices
Billing > Generate Invoices > Non-Consolidated > Reprint Invoices

The steps used to run the **Finalize and Print Invoices** and the **Reprint Invoices** processes are identical to those used in Core-CT 8.9. These processes are set up by default to produce XML invoices and to email invoices to customers.

For invoices to be sent by email to a customer from the **Finalize and Print Invoices** or the **Reprint Invoices** processes, the customer must have a customer contact who has been set up to receive invoices as an email attachment. See below for the steps required to set up a customer contact to receive invoices as email attachments.

Invoices generated by these processes must be viewed using **Report Manager**. They cannot be viewed from the **View Log/Trace** page.

Customer Contact Setup

To set up a customer contact to receive invoices as pdf attachments:

Navigation:

Customers > Contact Information

Click the **Add a Value** tab.

Contact Info

Find an Existing Value Add a New Value

SetID: BAAM1

Contact ID: NEXT

Add

1. Enter a value in the **SetID** field.

2. Accept the default value of NEXT in the **Contact ID** field. Core-CT will automatically assign a Contact ID when the contact is saved.
3. Click the **Add** button.
4. The **Contact** page displays.

SetID: BAAM1 Contact ID: NEXT

Contact Information Find | View All | First 1 of 1 | Last

*Effective Date: 12/19/2012 *Status: Active

*Name: Jane Smith *Contact Flag: External Contact

Title:

Email ID: jsmith@test.net

Salutation Code: Salutation:

*Preferred Communication: E-mail & Print

Language Code: English

Person ID:

[Contact Customer Information](#) [Contact Phone and Type](#)

[User Profile](#)

5. Enter the contact name in the **Contact Name** field.
6. Enter an email address for the contact in the **Email ID** field.
7. Select E-mail & Print from the **Preferred Communication** drop down list.
8. Click the **Contact Customer Information** link.
9. The **Contact Customer** page displays.

SetID: BAAM1 Contact ID: NEXT

Contact Customer Find | View All | First 1 of 1 | Last

Effective Date: 12/19/2012 Jane Smith

Link Contact to Customer Personalize | Find | View All | First 1 of 1 | Last

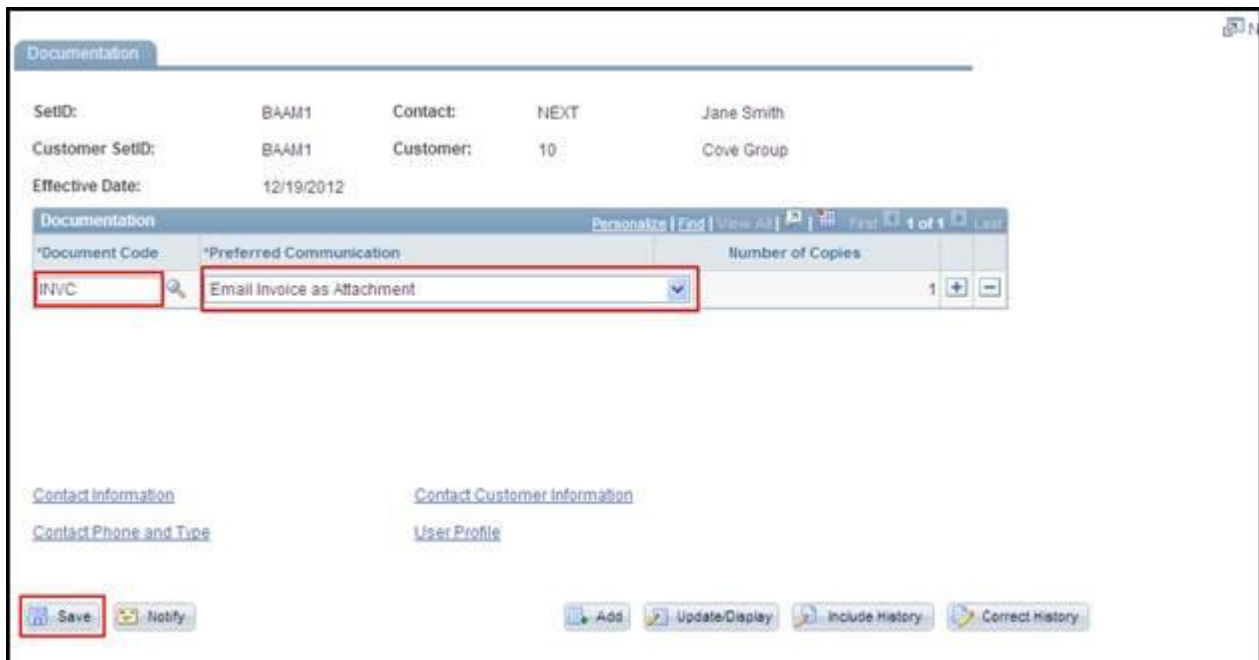
| *Customer SetID | *Customer ID | Customer Name | Location | Credit Card | Documentation | Primary Bill To | Primary Ship To | Primary Sold To |
|-----------------|--------------|---------------|----------|-------------|---------------|--------------------------|--------------------------|--------------------------|
| BAAM1 | | | | Credit Card | Documentation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

10. Use the look up button to select a Customer ID in the **Customer ID** field.
11. Use the look up button to select a location code in the **Location** field.



12. Click the **Documentation** link.

13. The **Documentation** page displays.



14. Select INVC in the **Document Code** field.

15. Select Email Invoice as Attachment from the **Preferred Communication** drop down list.

16. Click the **Save** button.

Generating Pro Formas

In Core-CT the Print Pro Forma process is set up to produce an XML file containing a Pro Forma. These files cannot be viewed from the **View/Log Trace** page. They must be viewed from the **Report Manager**.

Viewing XML Pro Formas and Invoices

Pro Formas and Invoices generated by running the **Print Pro Forma, Finalize and Print Invoices**, or the **Reprint Invoices** processes must be viewed from the **Report Manager**.

1. Run the **Finalize and Print Invoices, Reprint Invoices, or Print Pro Formas** process (using the same steps as in Core-CT 8.9).

2. Monitor the progress using the **Process Monitor**. When the process has a **Run Status** of Success and a **Distribution Status** of Posted, return to the **Run Control** page for the process.

| Select | Instance | Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details |
|--------------------------|----------|------|--------------|--------------|----------|--------------------------|------------|---------------------|-------------------------|
| <input type="checkbox"/> | 413 | | PSJob | BUJOB01 | SamJames | 11/08/2012 1:37:17PM EST | Success | Posted | Details |
| <input type="checkbox"/> | 408 | | PSJob | BUJOB01 | SamJames | 11/08/2012 1:08:57PM EST | Success | Posted | Details |

3. Click the **Report Manager** link. (The other option would be to add **Report Manager** to your favorites.)

Finalize and Print Print Options

Run Control ID: Finalize_Print Report Manager Process Monitor Run

Language: English Specified Recipient's

Selection Parameters End | View All | First | 1 of 1 | Last

Seq Nbr: 1 + -

Invoice Date Option

Processing Date
 User Defined

Range Selection

All Invoice ID
 Bill Cycle Cust ID
 Date Bill Added Bill Type
 Range ID Bill Source
 Public Voucher Number

From Business Unit: AESM1
To Business Unit: AESM1
From Invoice: GT04650
To Invoice: GT04650

4. Click the **Administration** tab.

List Explorer Administration Archives

View Reports For

Folder: General Instance: to: Refresh

Name: Created On: 95 Last 1 Days

Reports Personalize | End | View All | First | 1-7 of 7 | Last

| Report | Report Description | Folder Name | Completion Date/Time | Report ID | Process Instance |
|---|-----------------------------|-------------|----------------------|-----------|------------------|
| 1 BI_XMLPBURST | INVOICE BURSTING PROGRAM | General | 11/08/12 1:40PM | 5457108 | 418 |
| 2 BI_PRNXP01 - BI_PRNXP01.pdf | BI_PRNXP01 - BI_PRNXP01.PDF | General | 11/08/12 1:39PM | 5457109 | 417 |
| 3 BI_IVCEXT | INVOICE EXTRACT PROCESS | General | 11/08/12 1:38PM | 5457105 | 415 |
| 4 BIIVC000 | PRE-PROCESS & FINALIZATION | General | 11/08/12 1:38PM | 5457104 | 414 |
| 5 BI_PRNXP01 - BI_PRNXP01.pdf | BI_PRNXP01 - BI_PRNXP01.PDF | General | 11/08/12 1:10PM | 5457103 | 412 |

5. Click the link for the Pro Forma or Invoice.

Administration

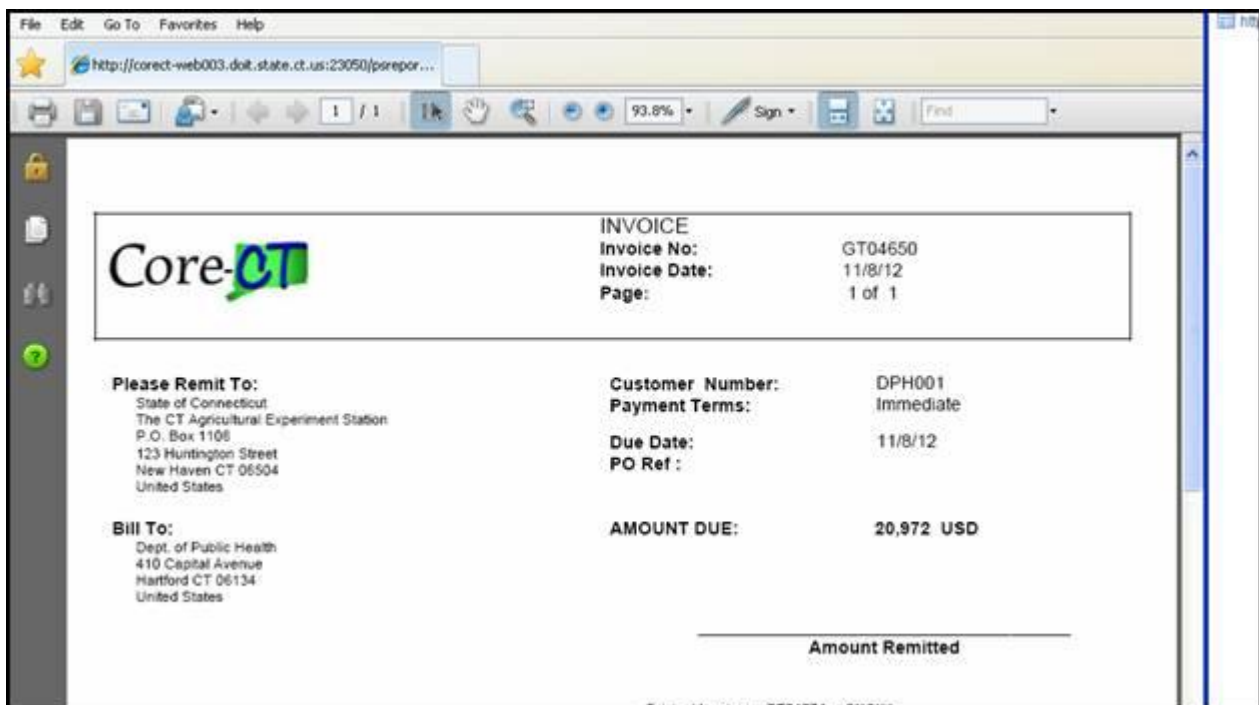
View Reports For

User ID: SamJames Type: Last 1 Days

Status: Folder: Instance: to:

| Select | Report ID | Prce Instance | Description | Request Date/Time | Format | Status | Details |
|--------------------------|-----------|---------------|--|----------------------|-------------------|--------|-------------------------|
| <input type="checkbox"/> | 5457109 | 417 | BI_PRNXPN01 - BI_PRNXPN01.pdf | 11/08/2012 1:39:24PM | Acrobat (*.pdf) | Posted | Details |
| <input type="checkbox"/> | 5457108 | 418 | Invoice Bursting Program | 11/08/2012 1:37:29PM | Text Files (*.bt) | Posted | Details |
| <input type="checkbox"/> | 5457105 | 415 | Invoice Extract Process | 11/08/2012 1:37:29PM | Text Files (*.bt) | Posted | Details |
| <input type="checkbox"/> | 5457104 | 414 | Pre-process & Finalization | 11/08/2012 1:37:29PM | Text Files (*.bt) | Posted | Details |

6. The Pro Forma or Invoice will display in a new window.



Rendering Pro Formas

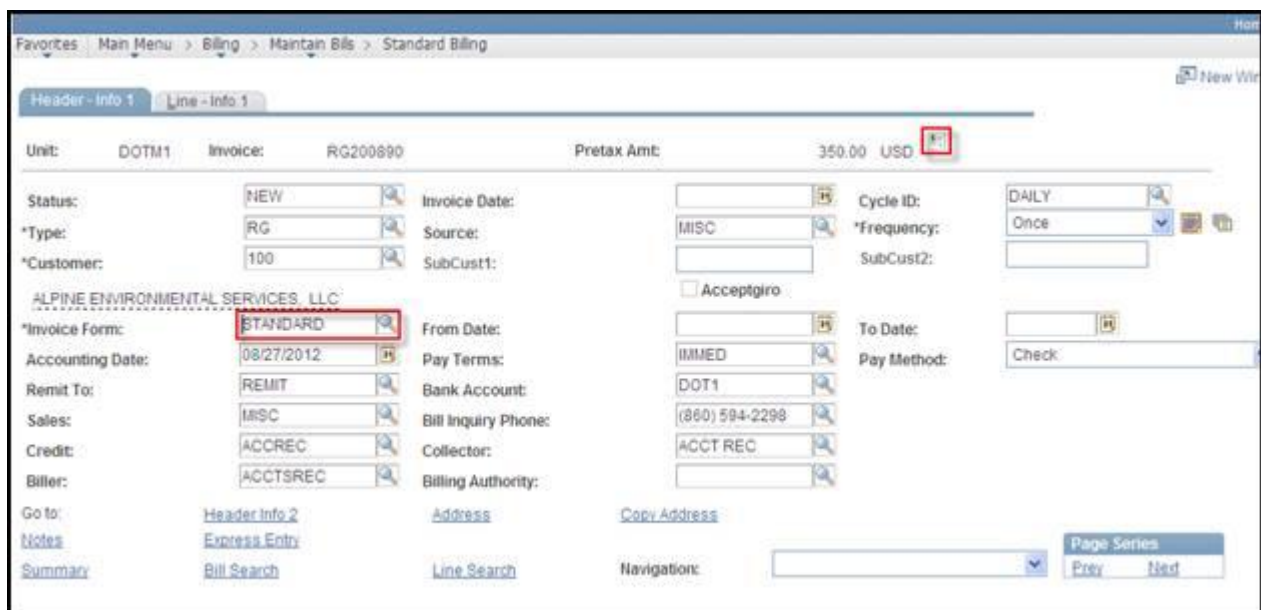
In Core-CT 9.1 Pro Formas can be rendered from Billing pages by clicking the **Pro Forma** button that appears at the upper right of the pages. Core-CT 9.1 will open the PDF of the Pro Forma in a new window. To view the Pro Forma in Core-CT 8.9 after clicking the **Pro Forma** button, users had to navigate to the **Process Monitor**. In Core-CT 9.1 users do not have to use the Process Monitor to view the Pro Forma pdf.

Navigation:

- Billing > Maintain Bills > Standard Billing
- Billing > Maintain Bills > Bill Summary
- Billing > Review Billing Information > Summary
- Billing > Review Billing Information > Details
- Billing > Locate Bills > Bills Not Invoiced > Summary
- Billing > Locate Bills > Bills Not Invoiced > Header Info 1
- Billing > Locate Bills > Lines Not Invoiced > Summary
- Billing > Locate Bills > Lines Not Invoiced > Header Info 1

Steps

1. Click the Pro Forma button .

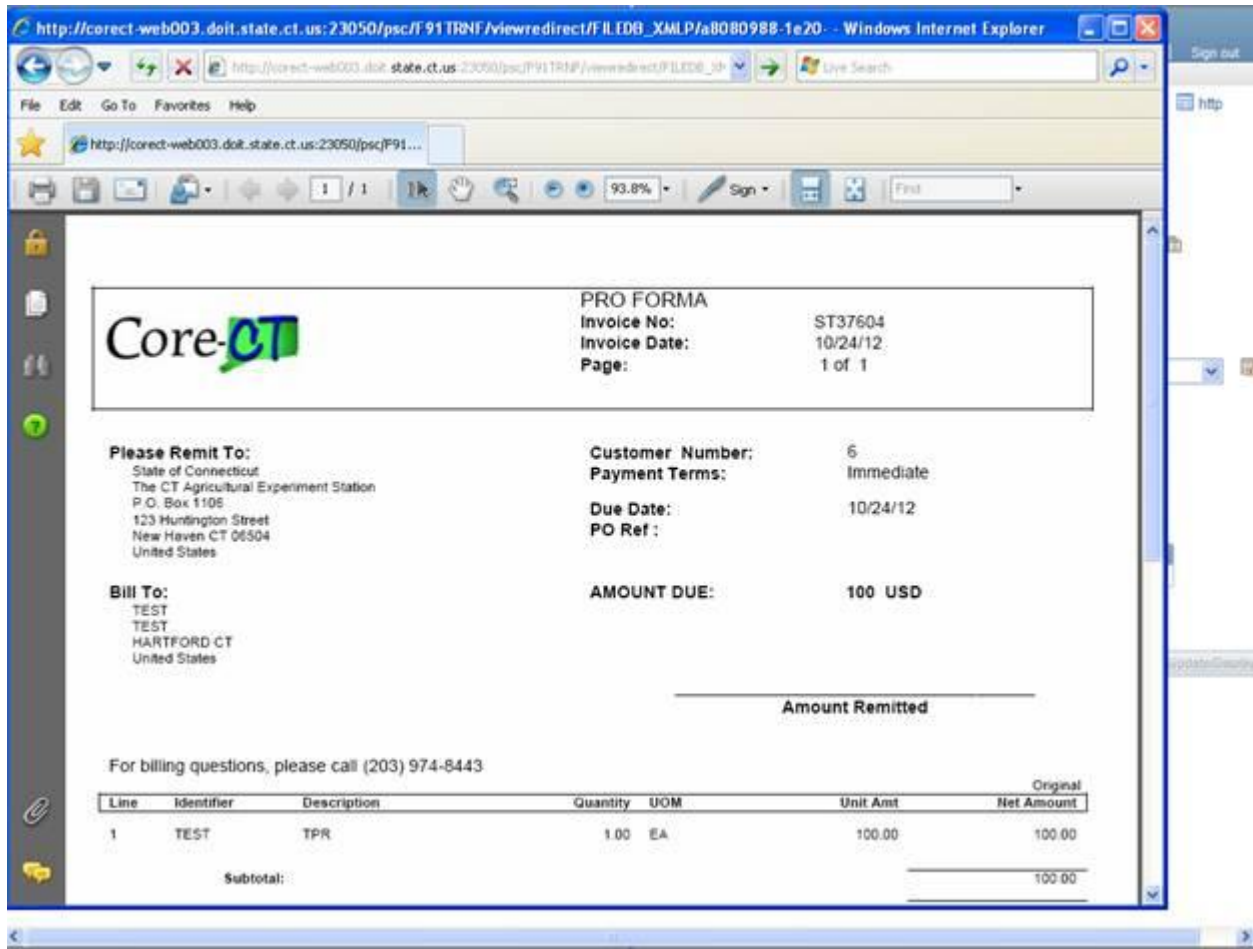


The screenshot displays a software interface for managing bills. The breadcrumb trail at the top reads: Favorites > Main Menu > Billing > Maintain Bills > Standard Billing. The interface is divided into sections for 'Header - Info 1' and 'Line - Info 1'. Key fields include:

- Unit: DOTM1, Invoice: RG200890, Pretax Amt: 350.00 USD (USD is highlighted with a red box).
- Status: NEW, Invoice Date: [empty], Cycle ID: DAILY.
- *Type: RG, Source: MISC, *Frequency: Once.
- *Customer: 100, SubCust1: [empty], SubCust2: [empty].
- ALPINE ENVIRONMENTAL SERVICES, LLC
- *Invoice Form: STANDARD (highlighted with a red box).
- Accounting Date: 08/27/2012, From Date: [empty], To Date: [empty].
- Remit To: REMIT, Pay Terms: IMMED, Pay Method: Check.
- Sales: MISC, Bank Account: DOT1.
- Credit: ACCREC, Bill Inquiry Phone: (800) 594-2298.
- Billers: ACCTSREC, Collector: ACCT REC.
- Billing Authority: [empty].

At the bottom, there are navigation options: Go to: Header Info 2, Address, Copy Address; Notes, Express Entry; Summary, Bill Search, Line Search; and a Page Series section with Prev and Next buttons.

2. The pdf of the Pro Forma for the bill displays in a new window.



Rendering Invoices

In Core-CT 9.1 invoices for bills with an INV status can be rendered from Billing pages by clicking the **View Invoice Image**. Core-CT 9.1 will open the pdf of the Invoice in a new window.

Navigation

- Billing > Review Billing Information > Summary
- Billing > Review Billing Information > Details
- Billing > Locate Bills > Bills Invoiced > Summary
- Billing > Locate Bills > Bills Invoiced > Header Info 1
- Billing > Locate Bills > Bills Invoiced > Summary
- Billing > Locate Bills > Bills Invoiced > Header Info 1

Steps

1. Locate the bill
2. Click the View Invoice Image link

| Header - Info 1 | | Line - Info 1 | | | | |
|-----------------------------|-------------------------------|-------------------------|------------------------------|-----------------------|-----------|---|
| Unit: | AESM1 | Invoice: | AES15 | Invoice Amt: | 15.00 USD | |
| Status: | INV | Invoice Date: | 10/02/2012 | Cycle ID: | DAILY | |
| Type: | EXT | Source: | MISC | Frequency: | Once | |
| Customer: | 6 TEST | SubCust1: | | SubCust2: | | |
| Invoice Form: | STANDARD | From Date: | | To Date: | | |
| Accounting Date: | 10/02/2012 | Pay Terms: | IMMED | Pay Method: | Check | View Invoice Image |
| Remit To: | REMIT | Bank Account: | AES1 | | | |
| Sales: | STPAY | Bill Inquiry Phone: | (203) 974-8443 | | | |
| Credit: | TPRTEST | Collect: | TESTING | | | |
| Bill: | JPARISI | Billing Authority: | | | | |
| Go to: | Header Info 2 | Address | Copy Address | Notes | | |
| Summary | Commit Ctrl | | | | | |
| Bill Search | Line Search | | | | | |
| | | | | Page Series | | |
| | | | | Header - Info 1 | | Prev Next |

3. A pdf of the invoice displays in a new window

The screenshot shows a web browser window with the following content:

Core-CT
INVOICE
 Invoice No: AES15
 Invoice Date: 10/2/12
 Page: 1 of 1

Please Remit To:
 State of Connecticut
 The CT Agricultural Experiment Station
 P.O. Box 1106
 123 Huntington Street
 New Haven CT 06504
 United States

Customer Number: 6
 Payment Terms: Immediate
 Due Date: 10/2/12
 PO Ref:

Bill To:
 TEST
 TEST
 HARTFORD CT
 United States

AMOUNT DUE: 15 USD

Amount Remitted