

Rendering a Pro Forma from the Standard Billing Pages

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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. In Core-CT 8.9 to view the Pro Forma 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.

This feature is available from the following navigations:

- 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

In this example a user renders a Pro Forma for a bill with a status of NEW from the **Header Info 1** page of the **Standard Billing** Component.

Procedure

Navigation: Billing > Maintain Bills > Standard Billing

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Billing > Maintain Bills > Standard Billing

New Window | Help | http

Bill Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit: = AESM1

Invoice: begins with

Bill Status: =

Customer: begins with

Contract: begins with

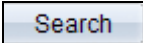
Bills in Business Unit: =

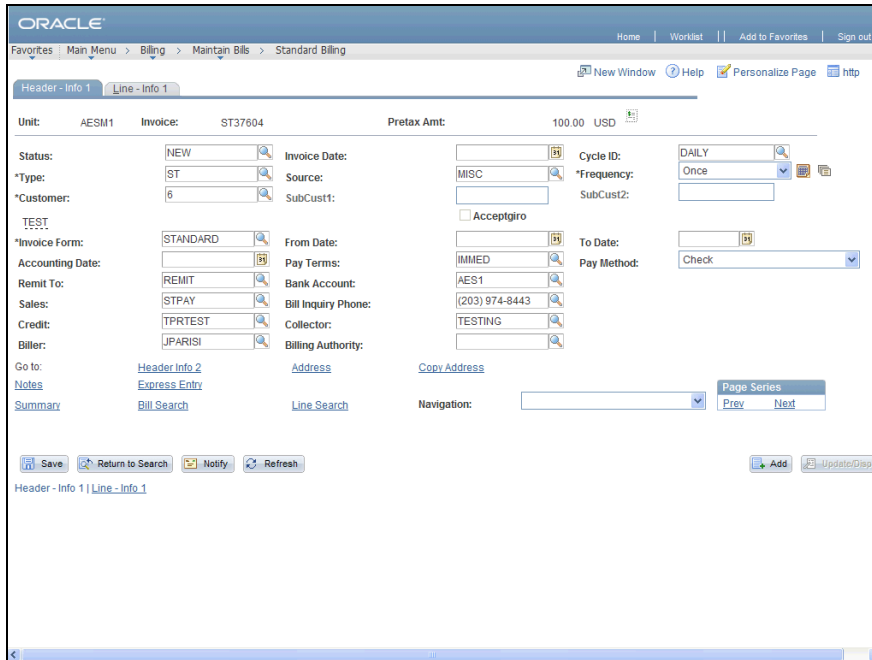
Template Invoice Flag: =


Case Sensitive

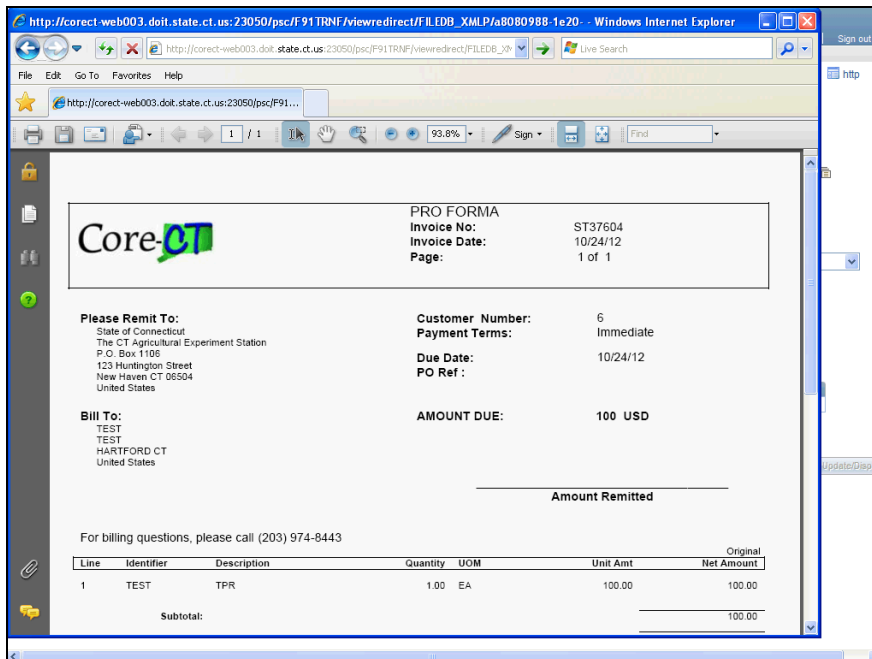
Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

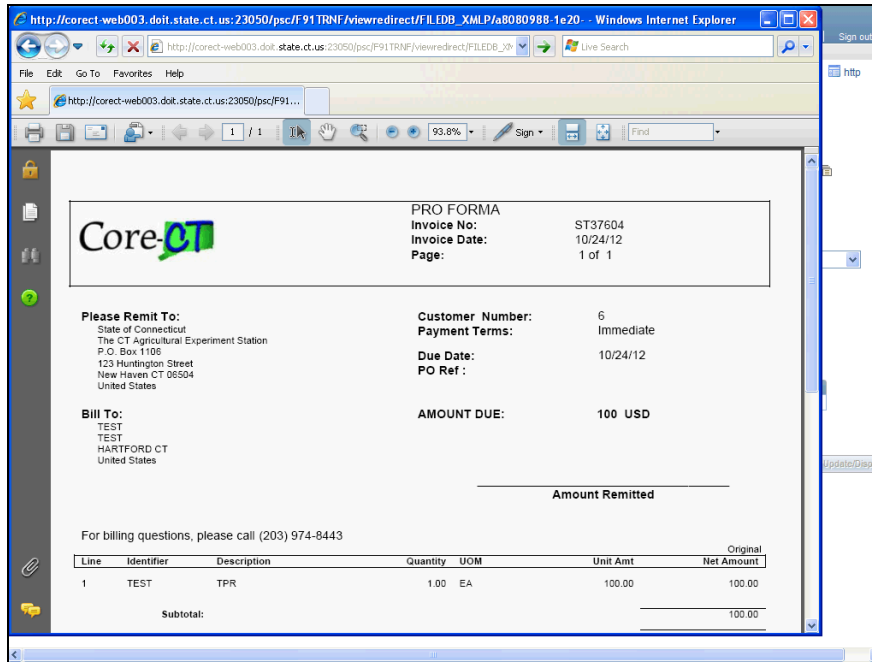
Step	Action
1.	Use the Bill Entry Find an Existing Value page to locate the invoice whose pro forma will be rendered. The Business Unit field may default based on User ID. It is a required field. Enter ST37604 into the Invoice field.
2.	Click the Search button. 




Step	Action
3.	Click the Pro Forma button. 



Step	Action
4.	The Pro Forma displays in a new window.



Step	Action
5.	Click the Close button. 
6.	End of Procedure.