Rendering a Pro Forma from the Standard Billing Pages
Created on 2/19/2013 4:50:00 PM

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Rendering a Pro Forma from the Standard Billing Pages

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.

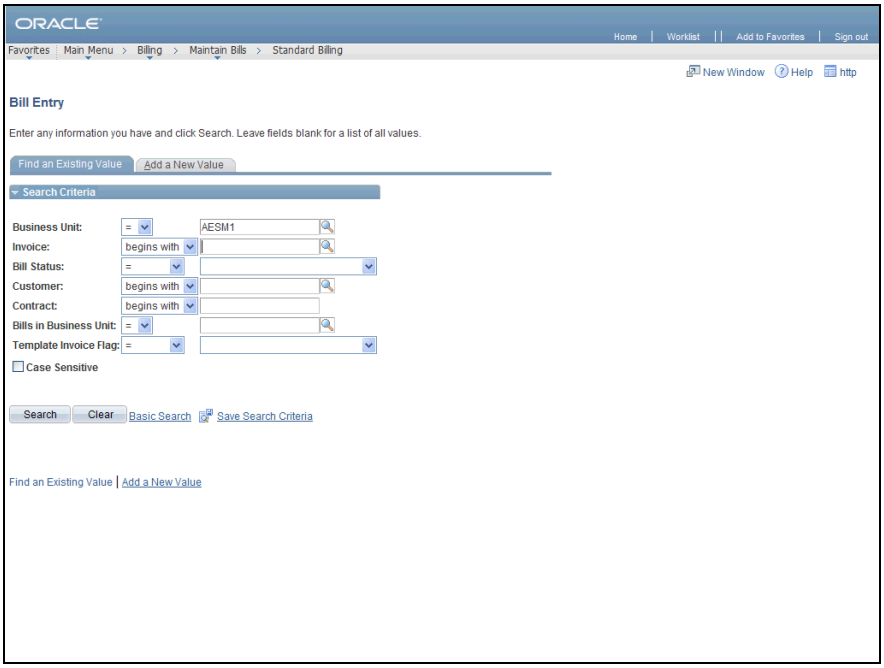
This feature is available from the following navigations:

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

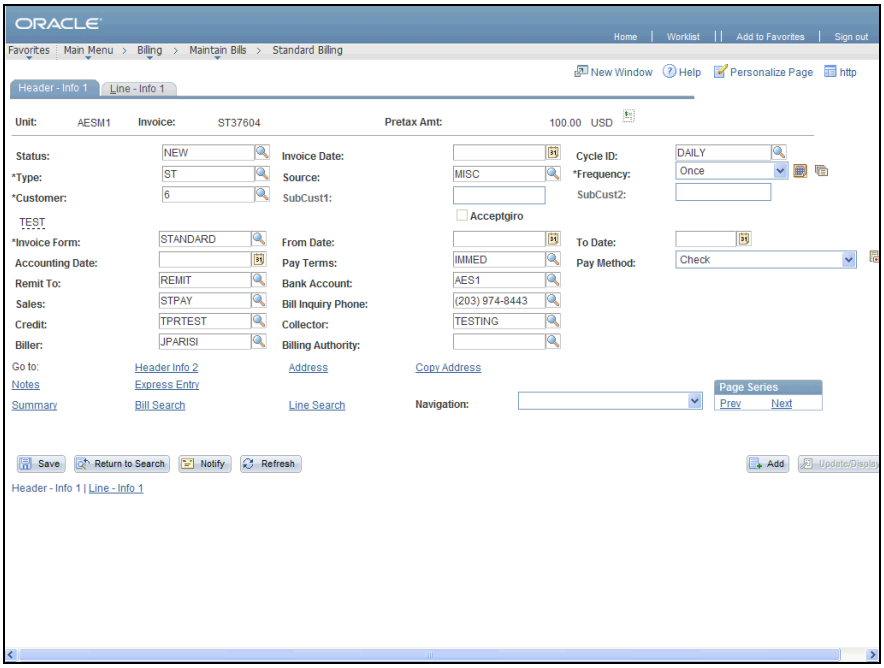
In this example a user renders a Pro Forma for a bill with a status of NEW from the **Header Info 1** page of the **Standard Billing** Component.

Procedure

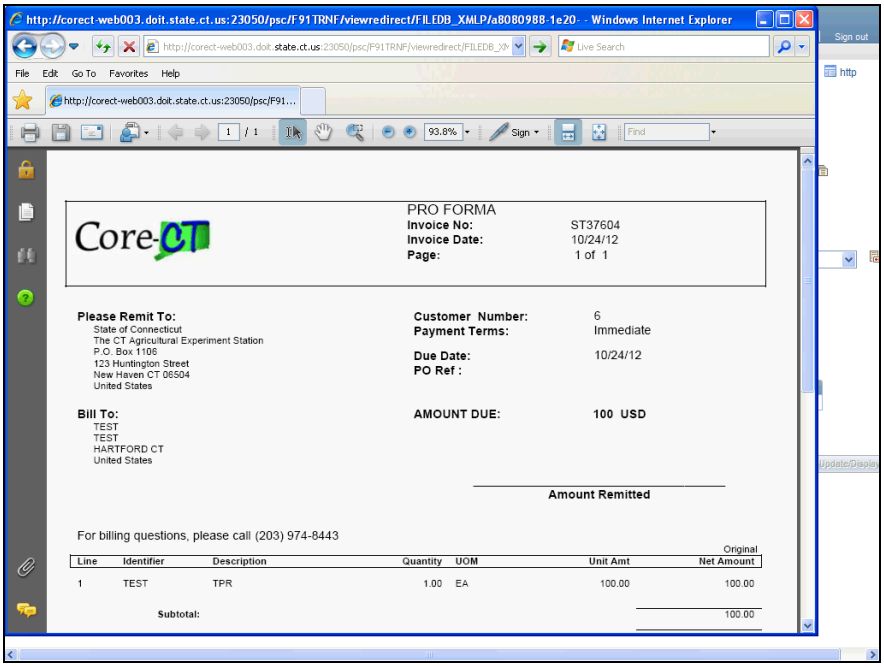
Navigation: Billing > Maintain Bills > Standard Billing



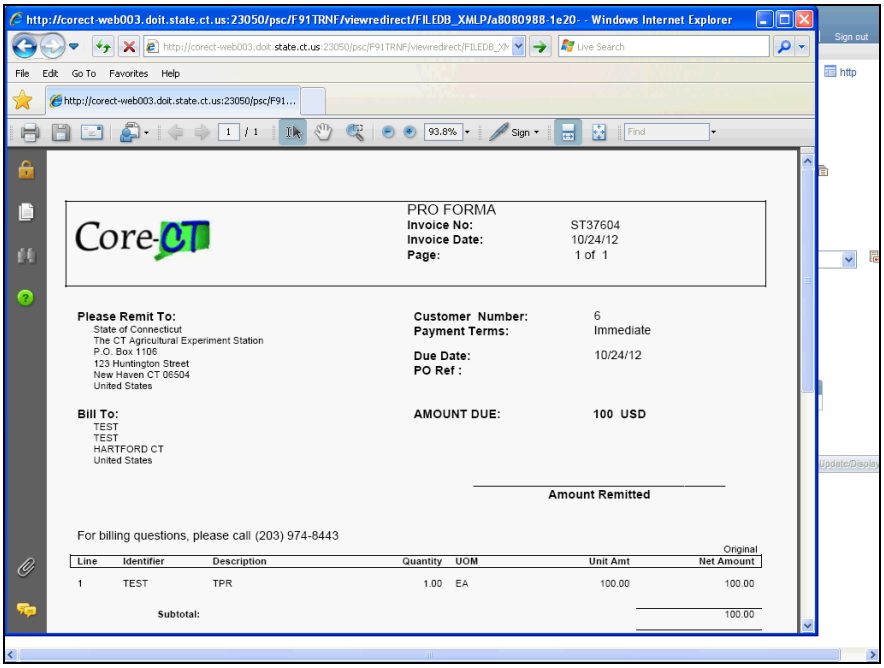
Step	Action
1.	Use the **Bill Entry Find an Existing Value** page to locate the invoice whose pro forma will be rendered. The **Business Unit** field may default based on User ID. It is a required field. Enter **ST37604** into the **Invoice** field.
2.	Click the **Search** button. Search



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.**