QUICK GUIDE



ADD NEW INVOICE

 Select the Payment Form tab and press the ⊕ icon to add a new invoice. Complete the Fields including Period From/To, Claim No & Financial Reporting Period.

OR CHANGE BACK CHARGES PAYMENT FORMS IDER LOG		PAYMENT PROGRE
	*Work completed through	
m	30.06.2021	m
	June 2021	m
		1000
		1000
		Cancel Add
		*Thirst compared frough

2. Review the header page and if required add any Back Charges applicable to this Invoice

ayable	Remaining to alk	con the	cary.				Percentage complete Payment for	
025.00	\$ 0.00			\$ 0.00	\$ 1,275.00	\$1,275.00	100.00% New	
			DETAILS	INVOICE ATTACHMENTS	UNC/TEMS		4 Σ	. 9
							Cancel	Save
			Payment for	n ID 0003				
Payment	t form details		Modified by Brenton Cridia	nd on 09	Summary			_
*Description					Gross amount this requ	est	\$ 1,275.0	
June Invoice					Less retention		\$0.0	
					Net amount earned this	fewgen	\$ 1,275.0	
*Work completed	Itom		"Work completed through		Less back charges		(\$ 250.00	
01.06.2021			30.06.2021		Tax		50.0	
					Net amount payable this	nequest	\$ 1,025.0	2
Progress estimat	enunber		Progress estimate billing period					
1			June 2021	m				
Comments				1000				
Back cha								

ATTACHING VENDOR INVOICE

1. Select the Invoice Attachments Tab and press the \oplus icon

* Invoice number		*Invoice date		
				Ű
*Invoice amount				
	\$ 0.00			
*File/Link				
			SELECT FIL	.E

2. Enter the Details including Vendor Invoice No, Invoice Date, Invoice Amount (Ex GST), Tax Amount (if applicable)

NOTE: Only enter a Tax amount if integrations are turned on and GST is being updated. If not leave as \$0.00

3. Attach a copy of the invoice

*Tie/Link
SELECT FILE

NOTE: The invoice attachment must be a PDF format

ASSIGN INVOICE TO CONTRACT ITEMS

 Select the Line Items tab and press the ⊕ icon. Select the line items included in this invoice and apply the amounts or quantity to each line.

			Search	
Lineitem ID 📍	— Туре	- Description	- Cost center	WBS (
0001	Service	Install GPO		100.03

ASSIGN INVOICE TO CONTRACT ITEMS

1. Once the Remaining to allocate (pre-tax) is at \$0 you have can complete the Invoice



2. From the Payment form Status select Submitted

