

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	
Eind an Existing Value Add a New Value	
SetID: BAAM1	
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.

Contact						
SetID: BAAM1	Contact ID:	NEXT				
Contact Information				End Vew AL 1	at C 1 of 1 D	Lest
*Effective Date:	12/19/2012		*Status:	Active	~	+
*Name:	Jane Smith		*Contact Flag:	External Contact	~	
Title:						
Email ID:	jsmith@test.net					
Salutation Code:	A	Salutation:		1		
*Preferred Communication:	E-mail &	Print	*			
Language Code:	English		*			
Person ID:						
Contact Customer Information	Cor	stact 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.

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etD:	BAAM	Contact ID:	NEXT						
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Unk Contact	t to Customer	12/19/2012 Jane St	Location	Credit Card	Documentation	Primary Bit To	Primary Ship To	Primary Sold To	

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.

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Iffective Date:		12/19/2012 Jane Smit	n							
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'Customer' 'Custom	er ID	Customer Name	Location		Credit Card	Documentation	Primary Bill To	Primary Ship To	Primary Sold To	
BAAM1 9, 10	9,	Cove Group	19.	Main	Credit Card	Documentation	1		1	•

- 12. Click the **Documentation** link.
- 13. The **Documentation** page displays.

SetID:	BAAM1	Contact:	NEXT	Jane Smith	
istomer SetID;	BAAM1	Customer:	10	Cove Group	
ffective Date:	12/19/2012				
Documentation			Personaliz	i End i Vere All 🏴 i 🏪 Trad	Citors Dilant
Document Code	Preferred Communica	ation		Number of Copies	
INVC Q	Email Invoice as Attac	hment		~	1 🛨 🖃
Contact information		Contact Cus	Inmer Information		
Contact Information			tomer information		
Contact information Contact Phone and Ty	DE	Contact Cus User Profile	tormer information		

- 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).

un Control ID: Finalize_Print anguage: English	Specified O Recipient's	Report Manager Process Monitor	Run	00
Selection Parameters			Find Verw All First	Gitort Di Las
Seq Nbr: 1 Invoice Date Option Processing Date User Defined				*
Range Selection O All O Bill Cycle	⊙ Invoice ID ○ Cust ID	From Business Unit: To Business Unit:	AESM1	
	O Bill Type	From Invoice: To Invoice:	GT04650 GT04650	

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.

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Run	Status		~	100000000000000000000000000000000000000	ion Status		~	Save C	on Refre	esh			
roce	iss List							Bersona	ilize Ein	al Vere	AL P 1	Test Cl 1-2	of 2 Di La
elect	Instance	Seq.	Process Ty	<u>pe</u>	Process Name	User	Run Date/	Time			Run Status	Distributi Status	Details
	413		PSJob		BUOB01	SamJames	11/08/20	12 1:37:17	PM EST		Success	Posted	Details
	408		PSJob		BUOBP01	SamJames	11/08/20	12 1:08:57	PMEST		Success	Posted	Details

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

anguage: English	rint	Report Manager Process Monitor	Run	Ш
Selection Parameters			Find View All Tits	1 of 1 D Last
Seq Nbr: 1 Invoice Date Option O Processing Date O User Defined Range Selection			AESM1	+-
 All Bill Cycle Date Bill Added Range ID Public Voucher Num 	 Invoice ID Cust ID Bill Type Bill Source 	From Business Unit: To Business Unit: From Invoice: To Invoice:	AESM1 (4) GT04650 GT04650	

4. Click the **Administration** tab.

Folder:		de administrativo de la			Refre	ch.		
	Y	Instance:	to:	Long			<u> </u>	
Name:		Created On:		31	Last	~	1	Days 💌
Reports			Pera	onalize	End View At	181	Fint D	1-7 of 7 🖸 Last
Report	Report D	escription	Folder Name		Completi Date/Tim		Report ID	Process
	ST INVOICE PROGRA	BURSTING	General		11/08/12 1:40PM		5457108	418
2 BI_PRNXPN0 BI_PRNXPN0	1- BI_PRND	(PN01 - (PN01.PDF	General		11/08/12 1:39PM		5 4 57109	417
3 BI_IVCEXT	INVOICE	EXTRACT PROCES	SS General		11/08/12 1:38PM		5457105	415
4 BIIVC000	PRE-PRI FINALIZA	OCESS &	General		11/08/12 1:38PM		5457104	414
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5. Click the link for the Pro Forma or Invoice.

View Repo	orts For									
User ID:	SamJa	mes	Type:	×	Last		~	1	Days	
Status:		Folder: 💌 Ins		Instar	stance: to:					
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Select	Report ID	Prcs Instance	Description			equest te/Time	Format	<u>Status</u>	Details	
	5457109	417	BI_PRNXPN01-B	PRNXPN01.p	CT III .	1/08/2012 39:24PM	Acrobat (*.pdf)	Posted	Details	
	5457108	418	Invoice Bursting Pr	rogram	10.055	I/08/2012 37:29PM	Text Files (*.bd)	Posted	<u>Details</u>	
	5457105	415	Invoice Extract Pro	cess		1/08/2012 37:29PM	Text Files (*.txt)	Posted	<u>Details</u>	
	5457104	414	Pre-process & Fin	alization	1.2.0	1/08/2012 37:29PM	Text Files	Posted	<u>Details</u>	

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

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			1
Core OT	INVOICE Invoice No: Invoice Date: Page:	GT04650 11/8/12 1 of 1	
Please Remit To: State of Connecticut The CT Agricultural Experiment Station	Customer Number: Payment Terms:	DPH001 Immediate	-
P.O. Box 1108 123 Huntington Street New Haven C7 10504 United States	Due Date: PO Ref :	11/8/12	
Bill To: Dept. of Public Health 410 Capital Avenue Hartford CT 06134 United States	AMOUNT DUE:	20,972 USD	
		Amount Remitted	

Rendering Pro Formas

In Core-CT 9.1 Pro Formas can be rendered from Billing pages by clicking the **Pro Forma** button ¹/₁ 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 ^[1].

Header - Info 1			5au 10	1.170-1719		E				
Unit: DOT	M1 Invoice:	RG200890	Pre	tax Amt:	350	1.00 USD 🛄				
Status:	NEW	2	Invoice Date:		B	Cycle ID:	DAILY		19	
Type:	RG	2	Source:	MISC	19	*Frequency:	Once		~	1
Customer:	100	2	SubCust1:			SubCust2:				
ALPINE ENVIRO	NMENTAL SERVICES.	LLC		Acceptgiro						
Invoice Form:	STANDA		From Date:		B	To Date:	[10		
Accounting Date:	08/27/20	12 🖪	Pay Terms:	IMMED	2	Pay Method:	Check	Tor C		
Remit To:	REMIT	Q.	Bank Account:	DOT1	9					
Sales:	MISC	2	Bill Inquiry Phone:	(860) 594-2298	19					
Credit:	ACOREC		Collector:	ACCT REC	12					
Biller:	ACCTSR	EC 🔍	Billing Authority:	[2					
Golto	Header Info 2		Address	Copy Address						
Notes	Express Entry			_				Page Ser	ies	
Summary	Bill Search		Line Search	Navigation:			~	Prey	Next	

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

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	-				
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			PRO FORMA		
C	ore-0		Invoice No: Invoice Date:	ST37604 10/24/12	
C			Page:	1 of 1	
			<u>e</u>		
Plass	e Remit To:		Customer Number:	6	
State of Connecticut			Payment Terms:	Immediate	
The CT Agricultural Experiment Station P.O. Box 1105			Due Date:	10/24/12	
Ner	Huntington Stree w Haven CT 0650 ted States	es Ma	PO Ref :		
BIII T			AMOUNT DUE:	100 USD	
TE	5T				
	RTFORD CT ted States				
				Amount Remitted	
For bi	lling questions	s, please call (203) 974-844	3		
Line	Identifier	Description	Quantity UOM	Unit Amt	Original Net Amount
1	TEST	TPR	1.00 EA	100.00	100.00
Subtotal:		2000			100.00

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

Unit: AESM1	Invoice: AES1	5	Invoice Amt:	15.00 USC	2
Status:	INV	Invoice Date:	10/02/2012	Cycle ID:	DAILY
Type:	EXT	Source:	MISC	Frequency:	Once
Customer:	6	SubCust1:		SubCust2:	
TEST					
Invoice Form:	STANDARD	From Date:		To Date:	
Accounting Date:	10/02/2012	Pay Terms:	IMMED	Pay Method:	Check
Remit To:	REMIT	Bank Account:	AES1		View Invoice Image
Sales:	STPAY	Bill Inquiry Phone:	(203) 974-8443		
Credit:	TPRTEST	Collect	TESTING		
Billen	JPARISI	Billing Authority:			
Go to:	Header Info 2	Address	Copy Address	Notes	
Summary	Commit Cntrl				Page Series
Bill Search	Line Search		Header - Info 1	× 1	Prev Next

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

Unit: AESM1	Invoice: AES	15 Invoice Amt:	15.00 USD 🕌	
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ill Search	Line Search	Core-OT	Invoice Date: 10/2	12
	60		Page: 1 of	1
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		Please Remit To:	Customer Number:	
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