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

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	
✓ Search Criteria	
Business Unit: = 💌 AESM1	
Invoice: begins with 🖌	
Bill Status:	
Customer: Degins with 💌	
Contract: begins with v	
Bills in Business Unit: = 🗸	
Template Invoice Flag: =	
Case Sensitive	
Search Clear Basic Search 🖓 Save Search Criteria	
Find on Fuisien Value Add a New Value	
Find an Existing value <u>Add a New Value</u>	

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.

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Header - Info 1	ne - Info 1	Standard bining				🔊 New Window	() Help	🍸 Personalize Page	📰 http
Unit: AESM1	Invoice: ST37604		Pretax Amt:		100	.00 USD			
Status:	NEW	Invoice Date:	[31	Cycle ID:	DAILY		
Type:	ST	Source:	[MISC	Q	*Frequency:	Once	~	
Customer:	6	SubCust1:	[SubCust2:			
TEST				Acceptgiro					
Invoice Form:	STANDARD	From Date:	[31	To Date:		1	
Accounting Date:		Pay Terms:	[IMMED		Pay Method:	Chec	k	*
Remit To:	REMIT	Bank Account:		AES1					
Sales:	STPAY	Bill Inquiry Phone:		(203) 974-8443					
Credit:	TPRTEST	Collector:		TESTING					
Biller:	JPARISI	Billing Authority:							
Go to:	Header Info 2	Address	Copy Ad	dress					
lotes	Express Entry							Page Series	
Summary	Bill Search	Line Search	Navigati	on:			*	Prev Next	
<mark>∰ Save</mark> & Return leader - Info 1 <u>Line - I</u>	to Search) 😰 Notify 🤅	Refresh						📑 Add 🖉	Update/Dis

Step	Action
3.	Click the Pro Forma button.

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	The P O	CT Agricultural E Box 1106	xperiment Station	Payr	nent Terms:	Immediate			
	123 Nev	Huntington Stree Haven CT 0650	t 4	Due PO F	Date: Ref :	10/24/12			
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	Bill TO TES	D: ST		AMC	UNT DUE:	100 USD			
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	For bi	ling questions	, please call (203) 974	-8443			Original		
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Step	Action
4.	The Pro Forma displays in a new window.



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