

How to Generate a Device Lease Invoice

1. On the Menu panel, click the **Lease** menu. This will open the Leases Search screen.
2. Click **Lease Billing** toolbar button. This will open the Lease Billing screen.

Leases

Open Billing Incentive **Lease Billing** Refresh Export Close

Lease Billing

Search Generate Invoice Site Print Export Close

Details

Selection Criteria

Condition	From	To	Condition	Value
Billing Month:	Between	1	Lease Start Date:	As of
Bill To Customer:	Between	0001005078	Invoice Date:	Equals
Location:	0001 - Fort Wayne		Consolidate Multiple Devices:	<input type="checkbox"/>

Layout Filter Records (F3)

Bill To Customer No.	Bill To Customer Name	Site Customer No.	Site Customer Name	Site No.	Site Description	Site Address	Site Location No.	Device Type	Serial #	Lease Amount	Bill Amount	Device ID
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Invoices to create: 0 Bill Amount Total:

3. Enter the **Invoice Date**. This is a required field.
 - a. To avoid accidental duplicate billing, the following conditions must be met for a Lease to be included in the current Billing.
 - b. For Annual Leases - the Last Lease Billing Date must be > 360 Days from the Invoice Date
 - c. For Monthly Leases - the Last Lease Billing Date must be in a prior month than the Invoice Date.
4. Filter the records in the grid using the fields in the **Selection Criteria** panel.

Lease Billing

Search Generate Invoice Site Print Export Close

Details

Selection Criteria

Condition	From	To	Condition	From	To
Billing Month:	Between	1	Lease Start Date:	As of	01/28/2016
Bill To Customer:	Between	0001005078	Invoice Date:	Equals	01/28/2016
Location:	0001 - Fort Wayne		Consolidate Multiple Devices:	<input type="checkbox"/>	

Layout Filter Records (F3)

Bill To Customer No.	Bill To Customer Name	Site Customer No.	Site Customer Name	Site No.	Site Description	Site Address	Site Location No.	Device Type	Serial #	Lease Amount	Bill Amount	Device ID
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- a. Billing Month - This is optional and can be blank for all Billing Months or provided to filter for a smaller subset of invoices.
 - b. Bill To Customer - This is optional, and can be used to filter leases for a specific customer or range of customers.
 - c. Location - This is optional and can be blank to bill for all records at once.
5. Click the **Search** toolbar button. The grid will display records based on the filters used in step 3.

Lease Billing

Search Generate Invoice Site Print Export Close

Search Generate Invoice Site Print Export Close

Lease Billing

Search Generate Invoice Site Print Export Close

Details

Selection Criteria

Condition	From	To	Condition	From	To
Billing Month:	Between	1	Lease Start Date:	As of	01/28/2016
Bill To Customer:	Between	0001005078	Invoice Date:	Equals	01/28/2016
Location:	0001 - Fort Wayne		Consolidate Multiple Devices:	<input type="checkbox"/>	

Layout Filter Records (F3)

Bill To Customer No.	Bill To Customer Name	Site Customer No.	Site Customer Name	Site No.	Site Description	Site Address	Site Location No.	Device Type	Serial #	Lease Amo...	Bill Amount	Device ID
✓ 0001005078	Customer A	0001005078	Customer A	0001	Tank A	1234 Main St.	0001 - Fort Wayne	Tank	103188	75.00	75.00	7

Invoices to create: 1 Bill Amount Total: 75.00

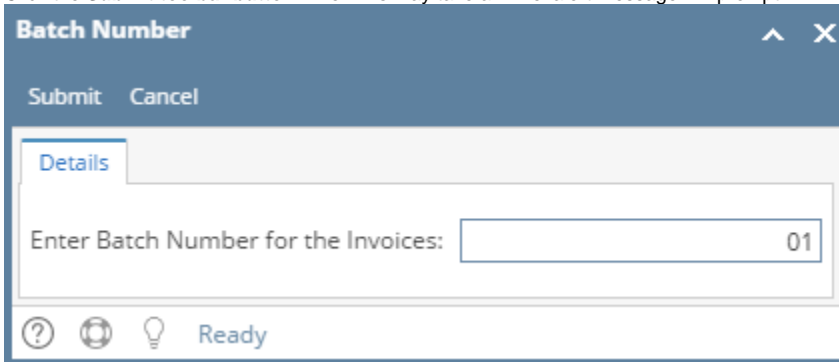
6. Click the **Generate Invoice** toolbar button. This will open the Batch Number screen.

Lease Billing

Search **Generate Invoice** Site Print Export Close

7. Enter a valid **Batch Number**.

8. Click the **Submit toolbar button**. The 'This may take a while' alert message will prompt.



A dialog box titled "Batch Number" with a blue header bar. Below the header, there are "Submit" and "Cancel" buttons. The main area has a tab labeled "Details". Below the tab, there is a text input field with the placeholder text "Enter Batch Number for the Invoices:" and the value "01". At the bottom, there is a status bar with icons for help, refresh, and a lightbulb, followed by the text "Ready".



iRely i21

This may take a while.

OK

9. Click the **OK button** on the alert message.
10. Once the process has been completed, an alert message about the outcome of the process will be displayed. Click the **OK button** on the message.




iRely i21

All Invoices were successfully created.

OK

11. If there are records that failed during the process, the message below will display. Clicking the **OK button** will open the **Failed Lease Billing(s) screen** which lists down all the records that failed to process, as well as the reason for its failure.



iRely i21

Not all Lease Invoices are created successfully. Click OK to display them in the grid. You should click the Print button to print and review them.
Failed Invoices are displayed along with their Fail Reason.

OK

Cancel

12. After successfully generating an invoice, **Device Lease Billed** will be displayed on the Consumption Sites > Event History tab, and the **Lease > Last Lease Billing Date** field will be updated and display the invoice date.

1. On the Menu panel, click the **Lease Billing** menu. This will open the Lease Billing screen.

Lease Billing

SearchGenerate InvoiceSitePrintExportClose

Details

Selection Criteria

Billing Month:

Condition

From

To

Between

Lease Start Date:

Condition

From

To

As of

Bill To Customer:

Condition

From

To

Between

Invoice Date:

Condition

From

To

Equals

Location:

Condition

From

To

Consolidate Multiple Devices:

Layout

Filter Records (F3)

Bill To Customer No.

Bill To Customer Na...

Site Customer ...

Site Customer Name

Site N...

Site Description

Site Address

Site Location

Invoices to create:

0

Bill Amount Total:

0.00

Ready

2. Enter the **Invoice Date**. This is a required field.
3. Filter the records in the grid using the fields in the **Selection Criteria** panel.

Details

Selection Criteria

Billing Month:

Condition

From

To

Between

1

1

Lease Start Date:

Condition

From

To

As of

01/28/2016

Bill To Customer:

Condition

From

To

Between

0001005078

0001005078

Invoice Date:

Condition

From

To

Equals

01/28/2016

Location:

Condition

From

To

Consolidate Multiple Devices:

Layout

Filter Records (F3)

Bill To Customer No.

Bill To Customer Na...

Site Customer ...

Site Customer Name

Site N...

Site Description

Site Address

Site Location

Invoices to create:

0

Bill Amount Total:

0.00

Ready

4. Click the **Search** toolbar button. The grid will display records based on the filters used in step 3.

The screenshot shows the 'Lease Billing' application window. At the top, there is a toolbar with buttons: Search, Generate Invoice, Site, Print, Export, and Close. The 'Search' button is highlighted with a red rectangle. Below the toolbar, the 'Details' tab is selected. Under 'Selection Criteria', there are filters for Billing Month (Between 1 and 1), Bill To Customer (Between 0001005078 and 0001005078), Location (0001 - Fort Wayne), Lease Start Date (As of 01/28/2016), Invoice Date (Equals 01/28/2016), and Consolidate Multiple Devices (unchecked). Below the filters, there is a table with 12 columns: Bill To Customer No., Bill To Customer Name, Site Customer No., Site Customer Name, Site No., Site Description, Site Address, Site Location No., Device Type, Serial #, Lease Amo..., Bill Amount, and Device ID. The table contains one record with the following values: 0001005078, Customer A, 0001005078, Customer A, 0001, Tank A, 1234 Main St., 0001 - Fort Wayne, Tank, 103188, 75.00, 75.00, and 7. At the bottom right, there are fields for 'Invoices to create:' (1) and 'Bill Amount Total:' (75.00). The status bar at the bottom shows 'Ready'.

5. Click the **Generate Invoice** toolbar button. This will open the Batch Number screen.

The screenshot shows the 'Lease Billing' application window. At the top, there is a toolbar with buttons: Search, Generate Invoice, Site, Print, Export, and Close. The 'Generate Invoice' button is highlighted with a red rectangle.

6. Enter a valid **Batch Number**.
7. Click the **Submit** toolbar button. The 'This may take a while' alert message will prompt.

The screenshot shows the 'Batch Number' dialog box. At the top, there is a toolbar with buttons: Submit and Cancel. The 'Submit' button is highlighted with a red rectangle. Below the toolbar, the 'Details' tab is selected. Under 'Details', there is a text input field labeled 'Enter Batch Number for the Invoices:' with the value '01' entered. At the bottom, there is a status bar with icons for help, refresh, and lightbulb, and the text 'Ready'.



iRely i21

This may take a while.

OK

8. Click the **OK** button on the alert message.

9. Once the process has been completed, an alert message about the outcome of the process will be displayed. Click the **OK button** on the message.



iRely i21

All Invoices were successfully created.

OK

10. If there are records that failed during the process, the message below will display. Clicking the **OK button** will open the **Failed Lease Billing(s) screen** which lists down all the records that failed to process, as well as the reason for its failure.



iRely i21

Not all Lease Invoices are created successfully. Click OK to display them in the grid. You should click the Print button to print and review them.

Failed Invoices are displayed along with their Fail Reason.

OK

Cancel

11. After successfully generating an invoice, the **Event-020** will be displayed on the Consumption Sites > Event History tab, and the **Lease > Last Lease Billing Date field** will be updated and display the invoice date.

1. On the Menu panel, click the **Lease Billing** menu. This will open the Lease Billing screen.

Lease Billing

Search Generate Invoice Print Close

Selection Criteria

Billing Month: Condition Between From To Lease Date: Condition Between From To

Bill To Customer: Condition Between From To Invoice Date: Condition Equals From To

Consolidate Multiple Devices: ☐

Bill To Customer No.	Bill To Customer Name	Site Customer No.	Site Customer Name	Site No.	Site Description	Site Address	Site Location No.
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Bill Amount Total: 0.000000

Ready

2. Enter the **Invoice Date**. This is a required field.
3. Filter the records in the grid using the fields in the **Selection Criteria** panel.

Selection Criteria

Billing Month: Condition Between From 6 To 6 Lease Date: Condition Between From 01/01/2015 To 12/30/2015

Bill To Customer: Condition Between From 0000000023 To 0000000023 Invoice Date: Condition Equals From 06/24/2015 To

Consolidate Multiple Devices: ☐

4. Click the **Search** toolbar button. The grid will display records based on the filters used in step 3.

Lease Billing

Search Generate Invoice Print Close

Selection Criteria

Billing Month: Condition Between From 6 To 6 Lease Date: Condition Between From 01/01/2015 To 12/30/2015

Bill To Customer: Condition Between From 0000000023 To 0000000023 Invoice Date: Condition Equals From 06/24/2015 To

Consolidate Multiple Devices: ☐

Bill To Customer No.	Bill To Customer Name	Site Customer No.	Site Customer Name	Site No.	Site Description	Site Address	Site Location No.	Device Type	Serial #	Lease Amou...	Bill Amount	Device ID
0000000023	UIN OIL	0000000023	UIN OIL	0001	Site 2	CASH CUSTOMER	064	Tank	SN11111	75.00	75.00	59862

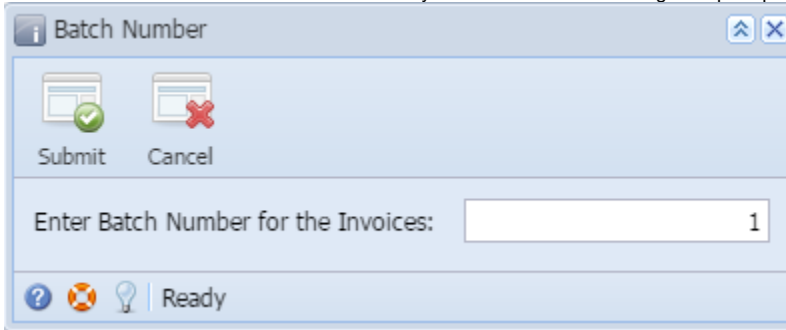
5. Click the **Generate Invoice** toolbar button. This will open the Batch Number screen.

Lease Billing

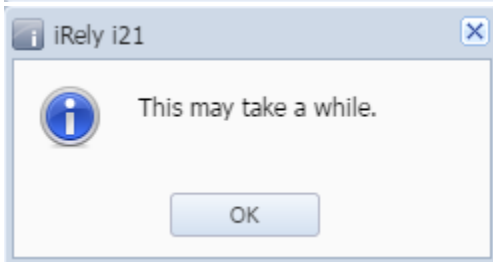
Search Generate Invoice Print Close

6. Enter a valid **Batch Number**.

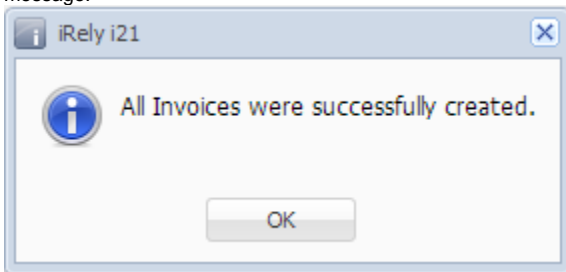
7. Click the **Submit toolbar button**. The 'This may take a while' alert message will prompt.



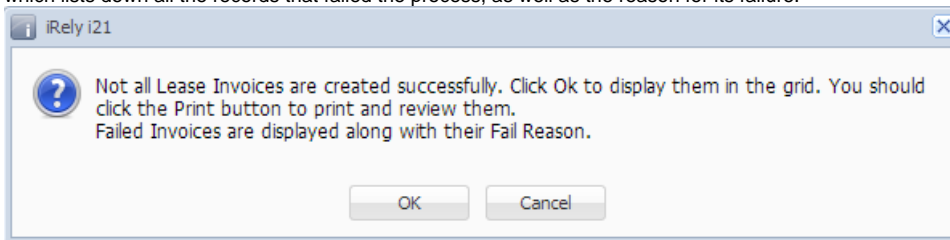
A dialog box titled "Batch Number" with a blue header bar. It contains two buttons: "Submit" with a green checkmark icon and "Cancel" with a red X icon. Below the buttons is a text input field with the label "Enter Batch Number for the Invoices:" and the value "1". At the bottom, there is a status bar with icons for help, error, and a lightbulb, followed by the text "Ready".



8. Click the **OK button** on the alert message.
9. Once the process has been completed, an alert message about the outcome of the process will be displayed. Click the **OK button** on the message.



10. If there are records that failed the process, this message below will display. Clicking the **OK button** will open the **Failed Lease Billing(s)** screen which lists down all the records that failed the process, as well as the reason for its failure.



11. After successfully generating an invoice, the **Event-020** will be displayed on the Consumption Sites > Event History tab, and the **Lease > Last Lease Billing Date field** will be updated and display the invoice date.

1. On the Menu panel, double click the **Lease Billing** menu. This will open the Lease Billing screen.

Lease Billing

Search Generate Invoice Print Close

Selection Criteria

Billing Month: Condition From To Lease Date: Condition From To

Bill To Customer: Condition From To Invoice Date: Condition From To

Consolidate Multiple Devices: ☐

Bill To Customer No. Bill To Customer Name Site Customer No. Site Customer Name Site No. Site Description Site Address Site Location No.

Bill Amount Total:

Ready

2. Enter the **Invoice Date**. This is a required field.
3. Filter the records in the grid using the fields in the **Selection Criteria** panel.

Lease Billing

Search Generate Invoice Print Close

Selection Criteria

Billing Month: Condition From To Lease Date: Condition From To

Bill To Customer: Condition From To Invoice Date: Condition From To

Consolidate Multiple Devices: ☐

Bill To Customer No. Bill To Customer Name Site Customer No. Site Customer Name Site No. Site Description Site Address Site Location No.

Bill Amount Total:

4. Click the **Search** toolbar button. The grid will display records based on the filters used in step 3.

Lease Billing

Search Generate Invoice Print Close

Selection Criteria

Billing Month: Condition From To Lease Date: Condition From To

Bill To Customer: Condition From To Invoice Date: Condition From To

Consolidate Multiple Devices: ☐

Bill To Customer No.	Bill To Customer Name	Site Customer No.	Site Customer Name	Site No.	Site Description	Site Address	Site Location No.	Device Type	Serial #	Lease Amou...	Bill Amount	Device ID
0000000010	UNCOL PETROLEUM	0001000004	UNCOL PETROLEUM	0001	Sample Site	MAIN STREET	071	Tank	641932	0.00	0.00	27587

5. Click the **Generate Invoice** toolbar button. This will open the Batch Number screen.

Lease Billing

Search Generate Invoice Print Close

Selection Criteria

Billing Month: Condition From To Lease Date: Condition From To

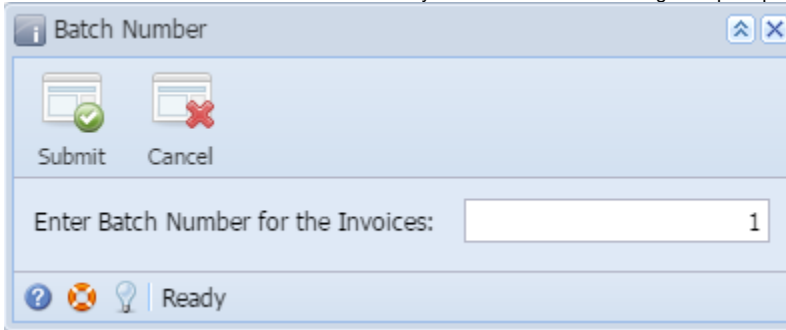
Bill To Customer: Condition From To Invoice Date: Condition From To

Consolidate Multiple Devices: ☐

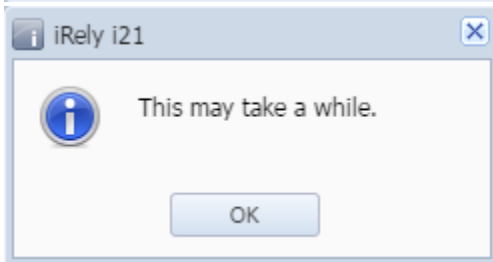
Bill To Customer No. Bill To Customer Name Site Customer No. Site Customer Name Site No. Site Description Site Address Site Location No. Device Type Serial # Lease Amou... Bill Amount Device ID

6. Enter a valid **Batch Number**.

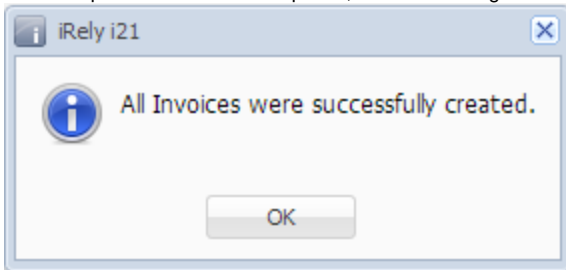
7. Click the **Submit toolbar button**. The 'This may take a while' alert message will prompt.



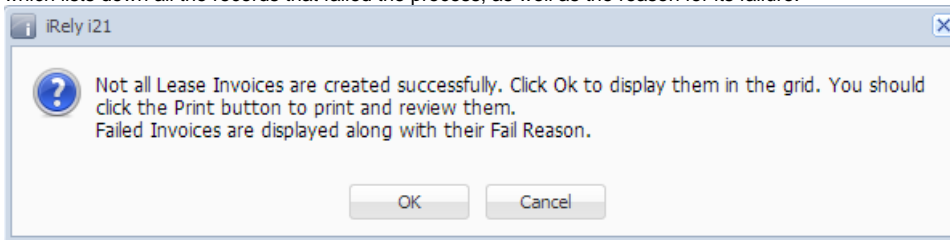
A dialog box titled "Batch Number" with a blue header bar. It contains two icons: a green checkmark and a red X. Below the icons are the labels "Submit" and "Cancel". A text field is labeled "Enter Batch Number for the Invoices:" and contains the number "1". At the bottom, there is a status bar with icons for help, error, and warning, followed by the word "Ready".



8. Click the **OK button** on the alert message.
9. Once the process has been completed, an alert message about the outcome of the process will be displayed. Here is a sample message.



10. If there are records that failed the process, this message below will display. Clicking the **OK button** will open the **Failed Lease Billing(s)** screen which lists down all the records that failed the process, as well as the reason for its failure.



11. After successfully generating an invoice, the **Event-020** will be displayed on the Consumption Sites > Event History tab, and the **Lease > Last Lease Billing Date field** will be updated and display the invoice date.