

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

Billing Month:	Condition	From	To	Lease Start Date:	Condition	Value
Between				As of		
Bill To Customer:	Between			Invoice Date:	Equals	
Location:				Consolidate Multiple Devices:		

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: 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.

Details

Selection Criteria

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

- 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

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

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: Bill Amount Total:

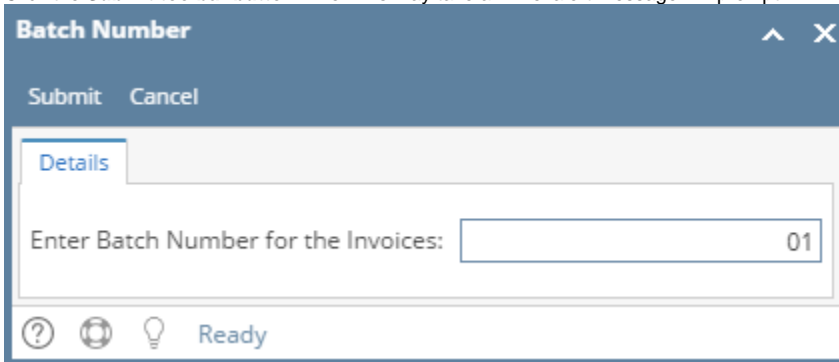
6. Click the **Generate Invoice** toolbar button. This will open the Batch Number screen.

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 containing "Submit" and "Cancel" buttons. Below the header is a tab labeled "Details". The main area contains the text "Enter Batch Number for the Invoices:" followed by a text input field containing the value "01". At the bottom, there is a status bar with icons for help, a globe, a lightbulb, and the text "Ready".



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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 window displays a 'Details' tab and a 'Selection Criteria' section with various filters. A table below shows filter records, and at the bottom, there are fields for 'Invoices to create' and 'Bill Amount Total'.

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

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

The screenshot shows the 'Lease Billing' application window. The toolbar at the top contains 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. It has a 'Details' tab and a text input field labeled 'Enter Batch Number for the Invoices:' with the value '01'. Below the input field, there are 'Submit' and 'Cancel' buttons. The 'Submit' button is highlighted with a red rectangle. At the bottom, there is a status bar with a question mark icon and the word 'Ready'.



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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 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: 0.000000

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 From To Lease Date: Condition From To

Bill To Customer: Condition From To Invoice Date: Condition From 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 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
0000000023	UIN OIL	0000000023	UIN OIL	0001	Site 2	CASH CUSTOMER	064	Tank	SN11111	75.00	75.00	59862

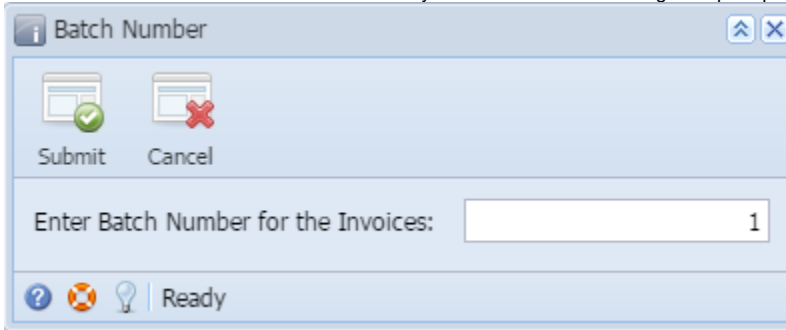
5. Click the **Generate Invoice** toolbar button. This will open the Batch Number screen.

Lease Billing

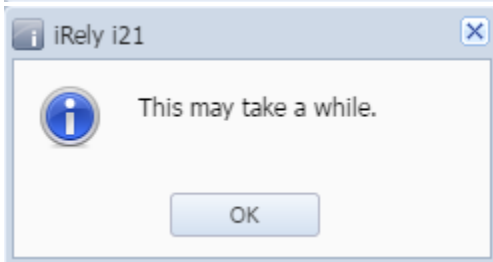
Search Generate Invoice Print Close

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

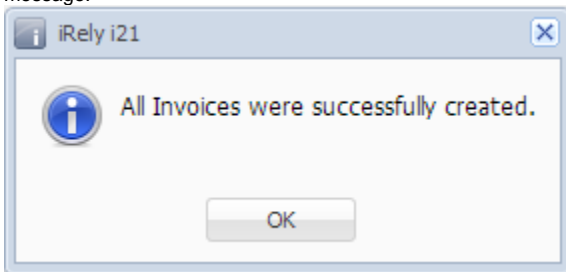
7. Click the **Submit toolbar button**. The 'This may take a while' alert message will prompt.



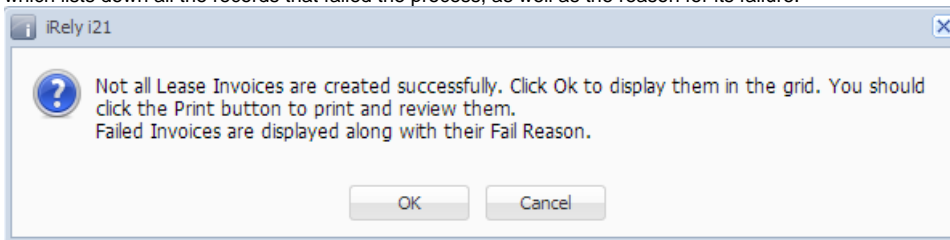
A dialog box titled "Batch Number" with a blue header bar. It contains two buttons: "Submit" with a green checkmark icon and "Cancel" with a red X icon. Below the buttons is a text input field with the label "Enter Batch Number for the Invoices:" and the value "1". At the bottom, there is a status bar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

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: ☐

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

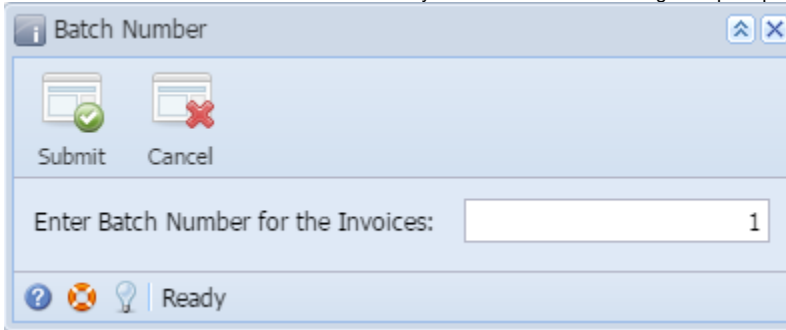
5. Click the **Generate Invoice** toolbar button. This will open the Batch Number screen.

Lease Billing

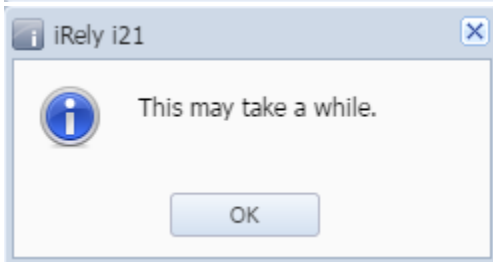
Search Generate Invoice Print Close

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

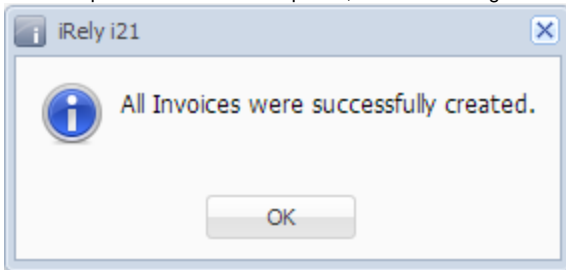
7. Click the **Submit toolbar button**. The 'This may take a while' alert message will prompt.



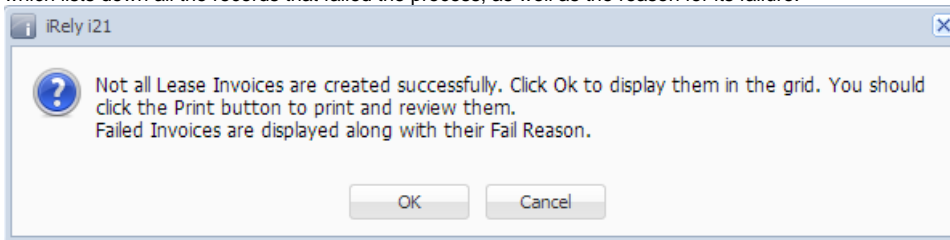
A dialog box titled "Batch Number" with a blue header bar. It contains two icons: a green checkmark and a red X. Below the icons are the labels "Submit" and "Cancel". A text field is labeled "Enter Batch Number for the Invoices:" and contains the number "1". At the bottom, there is a status bar with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