

Permit Invoicing

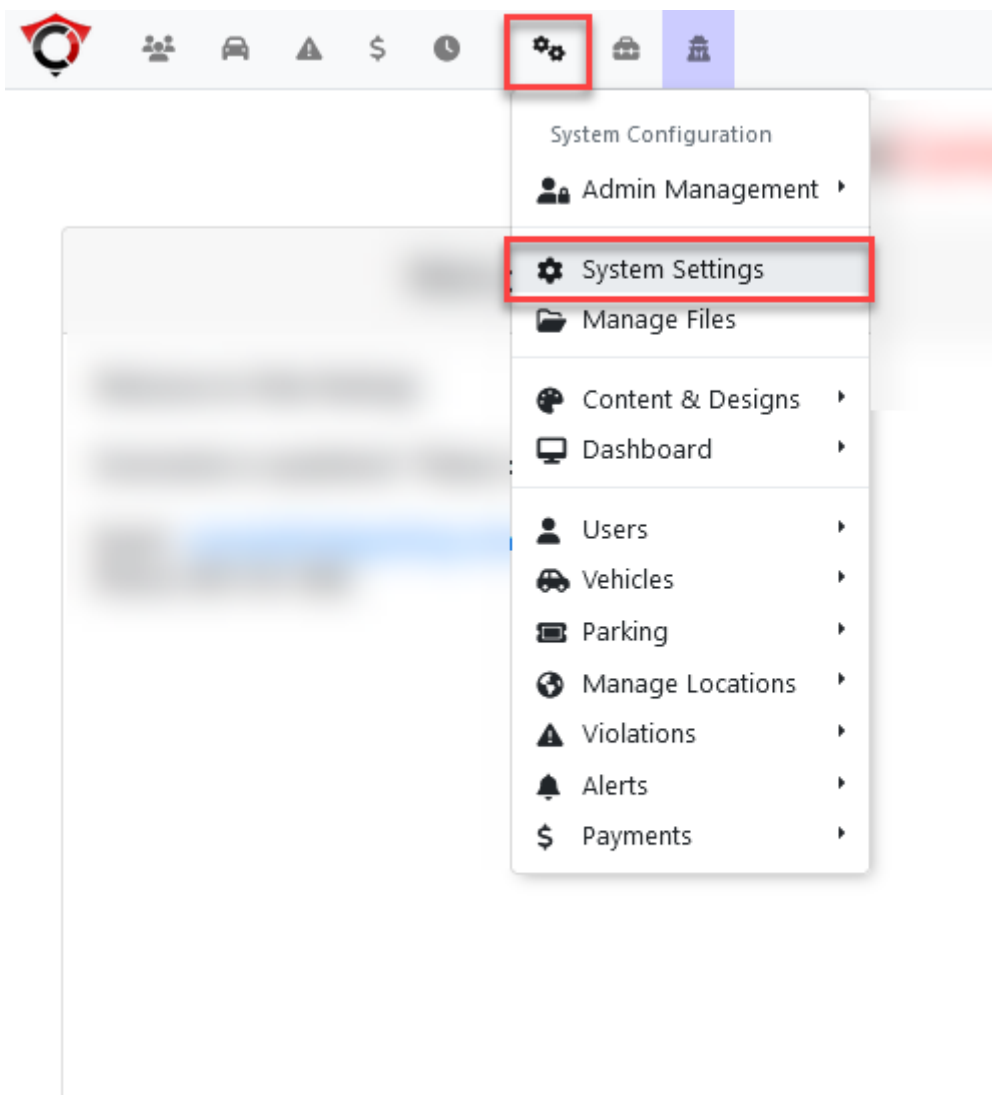
Invoice Preparation

Before invoices can be prepared, there must first be an invoice number set.

Locate the invoice number settings on the settings page.

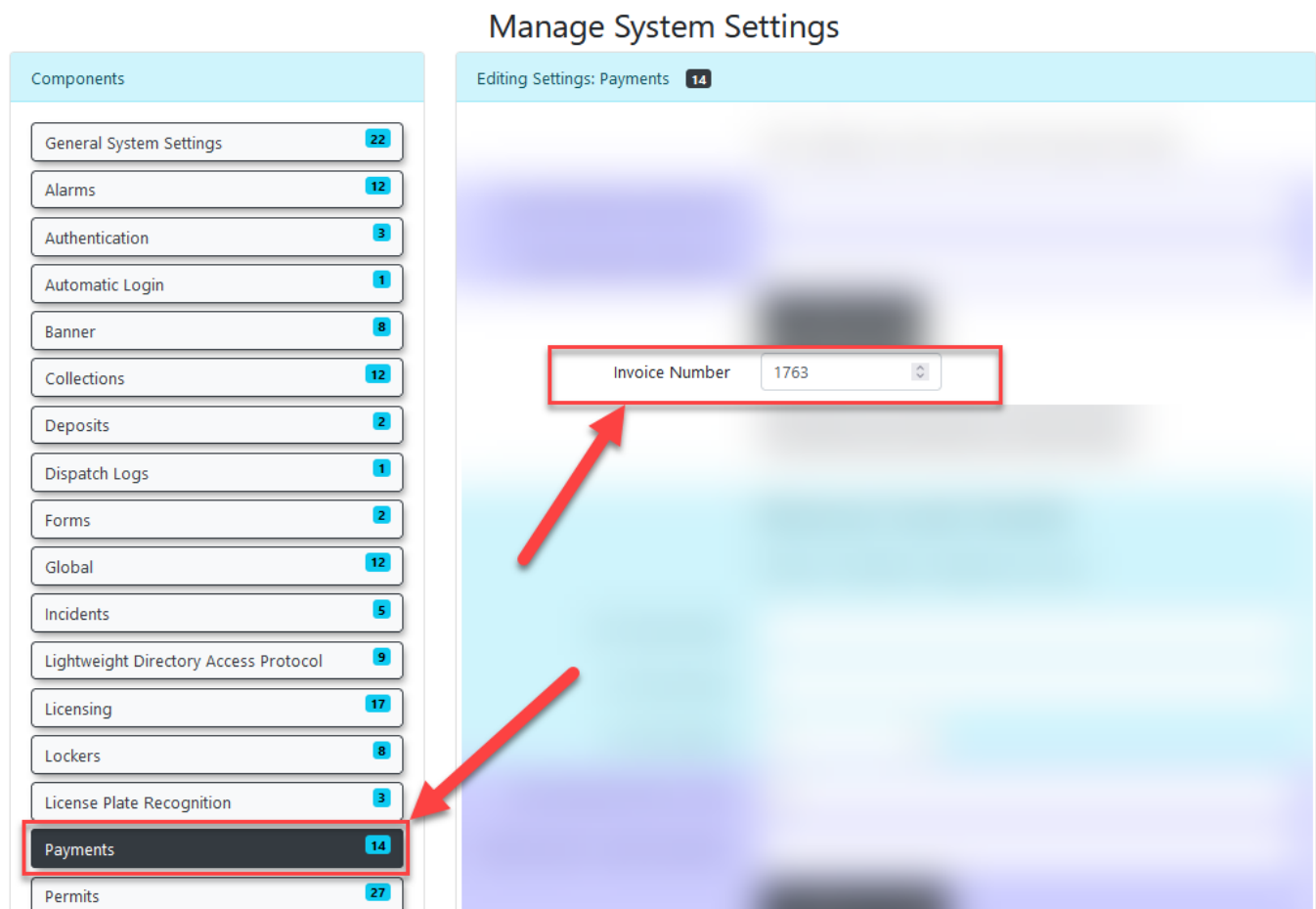
The settings page can be found under:

- **System Config > System Settings**



The invoice settings can be found under the **Payments** menu option.

The starting invoice number can be set here.



The permit invoice template must also be setup from the templates page.

Decide if unpaid permits will be allowed to rollover to the next period.

Setting Invoice Contacts

Different flags must be set to ensure that companies and individuals that require invoices will receive them.

First, navigate to the company edit screen. This can be found by going to the company search page, found under the menu items:

- **User Management -> Companies**

From this page, enter the search criteria and bring up the company that invoices will be set up for.

The edit button can be found next to the company information.

Company Search

[Create New Company](#)[Search Companies](#)

| Account Number | Account Name | # of Users | Receives Invoice | # of users(managers) | # of users(billing accounts) | |
|-------------------|------------------------------|------------|------------------|----------------------|------------------------------|----------------------|
| 123Retire | 123Retire | 4 | No | 1 | 0 | Edit |
| 7shifts | 7shifts | 1 | Yes | 1 | 0 | Edit |
| 7th Street Dental | 7th Street Dental | 2 | Yes | 2 | 0 | Edit |
| | Aaron Acceptance Corporation | 1 | No | 1 | 0 | Edit |

Clicking on this will bring up the company edit page.

Company Edit

[Back](#)

4 Users associated to this company.

[View Users](#)

Account Number

Account Name

☐ Receives Invoice

Invoice Emails

Invoice Comments

The relevant field here is invoice emails.

To ensure invoices are received by the correct recipients, populate the 'Invoice Emails' field on the company edit screen with the email addresses of the recipients.

These addresses can be separated by colons (:) or commas (,).

Invoice Emails

joneswindows@jw.com;accpayable@jw.com,sjones@jw.com

User Configuration

A user can be set as part of a company from the user's profile.

After configuring a user as part of a company, additional configuration options will appear in their profile.

Private Comment

Public Comment

There are no credit cards on file.

☒ Company Member

☐ Individual

Company

123Retire: 123Retire

?

☐ Company Manager

☐ Company Billing Account

For Company Members, an admin must designate a member to act as Company Billing Manager. This will be the company member that receives invoices.

Note: The Billing Manager does not need to be a Company Manager, though they are often assigned both roles. While there can be multiple Company Managers, there should only be one Company Billing Manager.

Designating a Billing Manager is required to activate invoicing.

Invoicing Individuals

Public Comment

There are no credit cards on file.

☐ Company Member

☒ Individual

Account Number

☒ Receives Invoice

For individual users who are not part of a company but need to receive invoices, edit their user profile and check both the 'Individual' and 'Receives Invoice' checkboxes.

Creating Permit Invoices

To start creating a permit invoice, first navigate to the page under the menu:

- **Permits -> Prepare Invoices**

The prepare invoices page will be displayed.

Prepare Invoices

| Title | Outstanding Permits | | Type ? | Days | Sale Start Date | Active Start Date | Sale / Active End Date |
|--|---------------------|---------------|--------|------|-----------------|-------------------|------------------------|
| Monthly Permit for September 1-30, 2023 | 0 | Not Available | M | 29 | Aug. 28, 2023 | Sep. 1, 2023 | Sep. 30, 2023 |
| Monthly Permit for October 1 - 31, 2023 | 0 | Not Available | M | 30 | Sep. 25, 2023 | Oct. 1, 2023 | Oct. 31, 2023 |
| Monthly Permit for November 1-30, 2023 | 0 | Not Available | M | 29 | Oct. 23, 2023 | Nov. 1, 2023 | Nov. 30, 2023 |
| Monthly Permit for December 1 - 31, 2023 | 0 | Not Available | M | 30 | Nov. 27, 2023 | Dec. 1, 2023 | Dec. 31, 2023 |
| Monthly Permit for January 1 - 31, 2024 | 0 | Not Available | M | 30 | Dec. 20, 2023 | Jan. 1, 2024 | Jan. 31, 2024 |
| Monthly Permit for February 1-29, 2024 | 0 | Not Available | M | 28 | Jan. 29, 2024 | Feb. 1, 2024 | Feb. 29, 2024 |
| Monthly Permit for March 1 - 31, 2024 | 0 | Not Available | M | 30 | Feb. 26, 2024 | Mar. 1, 2024 | Mar. 31, 2024 |
| Monthly Permit for April 1-30, 2024 | 0 | Not Available | M | 29 | Mar. 25, 2024 | Apr. 1, 2024 | Apr. 30, 2024 |
| Monthly Permit for May 1 - 31, 2024 | 0 | Not Available | M | 30 | Apr. 22, 2024 | May. 1, 2024 | May. 31, 2024 |
| Monthly Permit for June 1-30, 2024 | 0 | Not Available | M | 29 | May. 27, 2024 | Jun. 1, 2024 | Jun. 30, 2024 |
| Monthly Permit for July 1-31, 2024 | 0 | Not Available | M | 30 | Jun. 21, 2024 | Jul. 1, 2024 | Jul. 31, 2024 |
| Monthly Permit for August 1 - 31, 2024 | 0 | Not Available | M | 30 | Jul. 22, 2024 | Aug. 1, 2024 | Aug. 31, 2024 |
| Monthly Permit for September 1-30, 2024 | 0 | Not Available | M | 29 | Aug. 26, 2024 | Sep. 1, 2024 | Sep. 30, 2024 |
| Long-Term Validation | 0 | Not Available | O | 1855 | May. 2, 2022 | May. 2, 2022 | May. 31, 2027 |
| Monthly Permit for June 1-30, 2024 | 0 | Not Available | Y | 29 | Jun. 3, 2024 | Jun. 1, 2024 | Jun. 30, 2024 |

In sale windows where there are outstanding permits, a button will appear for prepare invoices.

Click on prepare invoices to start the invoicing process.

| | | | | | | | |
|----------------------|---|-----------------|---|-----|--------------|--------------|--------------|
| Monthly 1805 May | 0 | Not Available | M | 30 | Apr 15, 2018 | May 1, 2018 | May 31, 2018 |
| Monthly 1806 June | 0 | Not Available | M | 29 | May 19, 2018 | Jun 1, 2018 | Jun 30, 2018 |
| Past - April Monthly | 0 | Not Available | M | 1 | May 19, 2018 | May 19, 2018 | May 20, 2018 |
| Monthly 1807 July | 0 | Not Available | M | 30 | Jun 15, 2018 | Jul 1, 2018 | Jul 31, 2018 |
| October | 0 | Not Available | M | 30 | Sep 15, 2018 | Oct 1, 2018 | Oct 31, 2018 |
| November | 2 | Prepare Invoice | M | 29 | Oct 15, 2018 | Nov 1, 2018 | Nov 30, 2018 |
| Seasonal 2018 Q1 | 0 | Not Available | S | 119 | Dec 1, 2017 | Jan 1, 2018 | Apr 30, 2018 |

Note - Currently, only permits for user types that are not Student or Staff will be shown as available for invoicing.

Setting Invoice Billing and Due Dates

A list of invoices will be displayed for the sale window. All invoices will be selected by default, but specific invoices can be excluded by toggling them off.

As part of the process, the the Billing Date and Due Date for the invoices can be set.

Invoicing for November (M)

This is for rolling active permits from the current active sales window to the selected future sales window.

Billing Date

Oct 25, 2018

Due Date

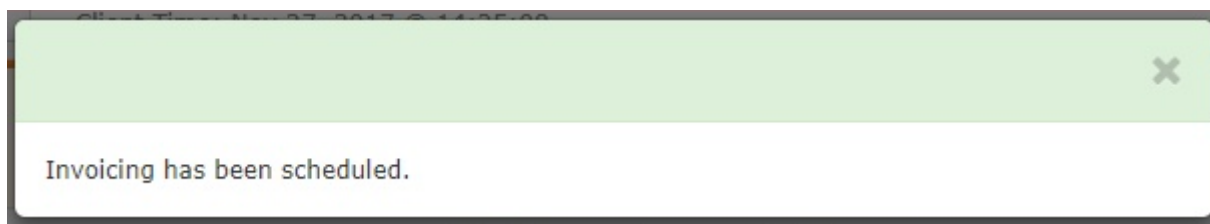
Nov 01, 2018

| Invoice | Total Permits | Total Amount | Account Number | Account Name | Contact Name | Email |
|-------------------------------------|---------------|--------------|----------------|-------------------------------------|--------------|--------------------------------------|
| <div>Toggle All</div> | | | | | | |
| <input checked="" type="checkbox"/> | 2 | \$226.00 | 197102 | <div><div></div>Jones Windows</div> | Company | Shannon Jones joneswindows@jw.com |

Send Invoices

Click **Send Invoices** to schedule the invoices for sending.

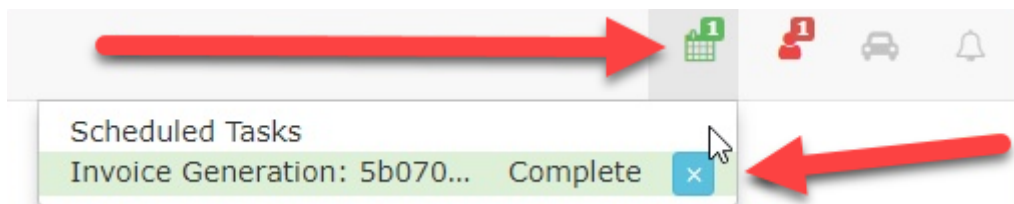
The following message will appear:



The invoicing task will appear under the calendar icon.

When clicked, the status of the task will be displayed; in this case, it shows as complete.

The task can be cleared by clicking the blue X button.



Emailing

At this stage, the invoices will be emailed to the companies selected.

The invoice will contain a list of users as well as the permit numbers being purchased.

By default, the email will be formatted as follows:

Address of Invoicing Company
Address line 2
Address line 3

Sample Invoice

Invoice

Bill To:

Jane Doe
Jane Doe
123 Any Street
AnyTown, ON
K0A1A0

Invoice No.: 1019
Date: 11/19/2020
Due Date: 12/19/2020

| Name | Item | Item Details | Quantity | Rate | Amount | Tax |
|-------------|--------|---|----------|---------|---------|-----|
| Jane Doe | Permit | 2500 Window: Long Term Parking Lot: GOL | 1 | \$25.00 | \$25.00 | Yes |
| Subtotal | | | | | \$25.00 | |
| Taxes | | | | | \$3.25 | |
| Total | | | | | \$28.25 | |
| Balance Due | | | | | \$28.25 | |

Note the dates:

- The billing date is the date the invoice was sent.
- The due date is the date the invoice is expected to be paid by.