Tutorial - Questions for Invoicing
Exercise 1: Request Invoicing

> **Prerequisites:** Check the value set for app param SET_CHECK_FOR_BILLING_ON_REQUEST_STATUS

Step 1 - Create Request

1. Go to Services > Requests screen
2. Hit new to create a new request > add mandatory data to the header
3. Add part usages
4. Add Labor and expenses
5. Complete the request
6. Go to the details tab > check if 'Billing Allowed' and 'Check For Billing' is ticked yes

Step 2 - Billing Generation

7. Go to Financials > Billing > Billing Generation
8. Enter the request ID created in step 1
9. Check the following fields, so they are checked to yes
   (Extract to Vouchers, Include Part Usage, Include Non-Part Usage, and Include Field Service)
10. Press Submit > hit OK on the alert message and go to the run log ID mentioned. Check the details in the run log to see if the billing generation had processed

Step 3 – Process the Voucher

11. Go to Financials > Billing > Voucher
12. Search the voucher from the request ID billed (enter value on search criteria, under request tab, Request ID field)
13. See if the voucher details are correct and status is set to Reviewed
14. Press 'Post to Invoice' button. Then the voucher should get removed from the system

Step 4 – Invoice

15. Go to Financials > Billing > Invoice
16. Search for the invoice through the request ID (enter value on search criteria, under request tab, Request ID field)
17. Look at the invoice details making sure everything is correct
18. Press the 'Copy Invoice' button to create a new voucher if you want to invoice the customer later again

Exercise 2: Backout Invoice Demo

This is used to reverse all charges been made.

1. Go to Financials > Billing > Invoice and search for the invoice created in above step 4
2. Press Backout Invoice. This will create a voucher

3. Go to the respective voucher. A credit memo would have been created
4. Post the respective voucher to invoice
5. Check for the invoice

> **Tips: Navigating to the vouchers and invoices.**
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> You can search for particular vouchers or invoices by searching from respective requests related. Or else, by noting down 'foreign key num 1' recorded in the corresponding run logs, which are the values for the voucher run IDs and invoice run IDs.

Exercise 3: Credit/Rebill Invoice

This is used to rebill all charges been made.

1. Create a request with part usages or labor expenses
2. Complete and Invoice the request
3. Go to Financials > Billing > Invoice and search for the invoice created in step 2
4. Press Credit/Rebill on the invoice. This will create a voucher
5. Go to the respective voucher. A credit memo would have been created
6. Go back to request > reopen the request
7. Edit the part usage or labor amount you want to change > save
8. Complete the request and reinvoice the request
9. Check for the invoice to see if details are correct

Exercise 4: Error Handling

> **Prerequisites:** Check if the value for the App param HOLD_ENTIRE_VOUCHER_WHEN_REVIEW_FAILS is set to Yes.

Do this exercise to get familiarized with handling errors you may come across when performing billing generation. For the purpose of getting an error, lets create two lines in the request, one with an error line.

1. Go to Request screen > create a new request
2. Add two-part usage lines, one with unit price zero (to do this, you must remove the price detail from your part screen), and one with a unit price. The one without a unit price should give you an error
3. Complete the request
4. Go to billing generation screen > tick extract to vouchers, include part usage, include field service check boxes, add a billing date and the request id> hit submit
5. Go to voucher screen, search for the particular voucher. The voucher status field should state "Hold". The error status on the defective lines should say 'NPRC'
6. To identify what 'NPRC' means, go to Admin > Codes > FSM codes > search for code name Error_Status. There you should see NPRC = NoPricingFound

Do the same with having App Param set to 'No'. Then the voucher status will say "Reviewed with Errors".

- If the voucher has the status "Reviewed with Errors", then you can correct errors and post to invoice.
- If the voucher has the status "Hold", then you can't process the voucher and post to invoice.

Exercise 5:

Imagine you are a service provider who supports property damage restoration and has received a request from the customer (use the customer place you have created, e.g. MX-0010). The customer has witnessed a damage in one of their building, for which they would want you to come and inspect. You are required to process with this request and bill to the customer the time and material went for the work after completing the inspection.

Use the following details to create part usages and non-part usages,

Parts used: CONDENSER COIL and EVAPORATOR COIL
Technician travel time: 3 hours
Technician inspection time:5 hours

Create vouchers and invoices as appropriate.

Exercise 6:

You have mistakenly sent an invoice to the customer MX-0010, that is something should not have sent until next month as agreed. Hence you need to rectify this. Please perform how you would do this. Following are the RMA details you need to create the invoice before reverting it.

1. Create a new RMA
2. Specify customer MX-0010 > Add line > Select return reason 'Repair and Return' > add the part FAN
3. Set Repair place, Receive to place and Ship to Place as 'TDC-REPAIR'
4. Receive RMA > Add serial and post the receipt
5. Go to repair center (RC) screen > search for the serial
6. Click 'Transfer Unit' and set the unusable unit to usable
7. Tick ready to ship check box to create the return part need
8. Go back to RMA and see if you have got the line in part need list
9. Add about 5 hours as labor expenses
10. Create the shipment and ship usable unit to the customer
11. Go to billing generation and invoice the RMA
12. Now proceed to rectify this invoice

Exercise 7:

Proceed with the above RMA by increasing the labor expenses you have earlier set. And reinvoice the same.

Exercise 8:

You have mistakenly sent an invoice to the customer MX-0010 but have decided to cancel it due to other business purpose. Please perform how you would do this. Following are the RMA details you need to create the invoice and before reverting it.

1. Create a new RMA
2. Specify customer MX-0010 > Add line > Select return reason 'Repair and Return' > add the part FAN
3. Set Repair place, Receive to place and Ship to Place as 'TDC-REPAIR'
4. Receive RMA > Add serial and post the receipt
5. Go to repair center (RC) screen > search for the serial
6. Click 'Transfer Unit' and set the unusable unit to usable
7. Tick ready to ship check box to create the return part need
8. Go back to RMA and see if you have got the line in part need list
9. Add about 5 hours as labor expenses
10. Create the shipment and ship usable unit to the customer
11. Go to billing generation and invoice the RMA
12. Now proceed to revert this invoice