Automating Invoice Generation

Quick Reference Guide

Contents

Chapter

1

Introduction

Introduction

Smile is designed to generate invoices on a regular basis for recurring billing, typically on a monthly basis. These invoices will include recurring charges such as monthly plan charges, usage charges such as voice call charges or data usage charges, and deferred charges such as invoice items that had been left for billing in the next cycle.

The first stage of invoice generation is for Smile to process a billing period. Smile will prepare a draft invoice, also known as an open invoice, for approval. Additionally, the relevant billing period will be marked as in approval and any subsequently loaded usage data will be loaded to the next most appropriate open billing period.

Additional steps to complete processing include reviewing and approval of draft invoices, closing the invoices, updating account balances and closing the billing periods.

This document explains how the generation of invoices in Smile can be automated.

For more information on generating invoices, see the *Smile User Guide*.

Chapter

2

Manual invoices

Generation of invoices

By default Smile requires operators to generate invoices manually. This is can be done for all accounts or for a specific account.

This manual approach is recommended in most cases, particularly for:

- new Smile customers who wish to cautiously run and check each step of the billing cycle as they become familiar with Smile, and
- customers who need to complete various steps beforehand that are required for the billing process. For example, awaiting data entry for recent sales and usage data from suppliers.

As a customer base grows, the generation of invoices can become time consuming. Running processing after business hours is usually the next phase for more mature customers.

For customers who are comfortable with automation and do not need to wait for completion of any prerequisite billing tasks, automation of invoice generation may be appropriate. In organisations that do daily billing, automation of invoice generation is worth considering.

CAUTION: Automation of invoice generation will process billing for **all** outstanding periods.
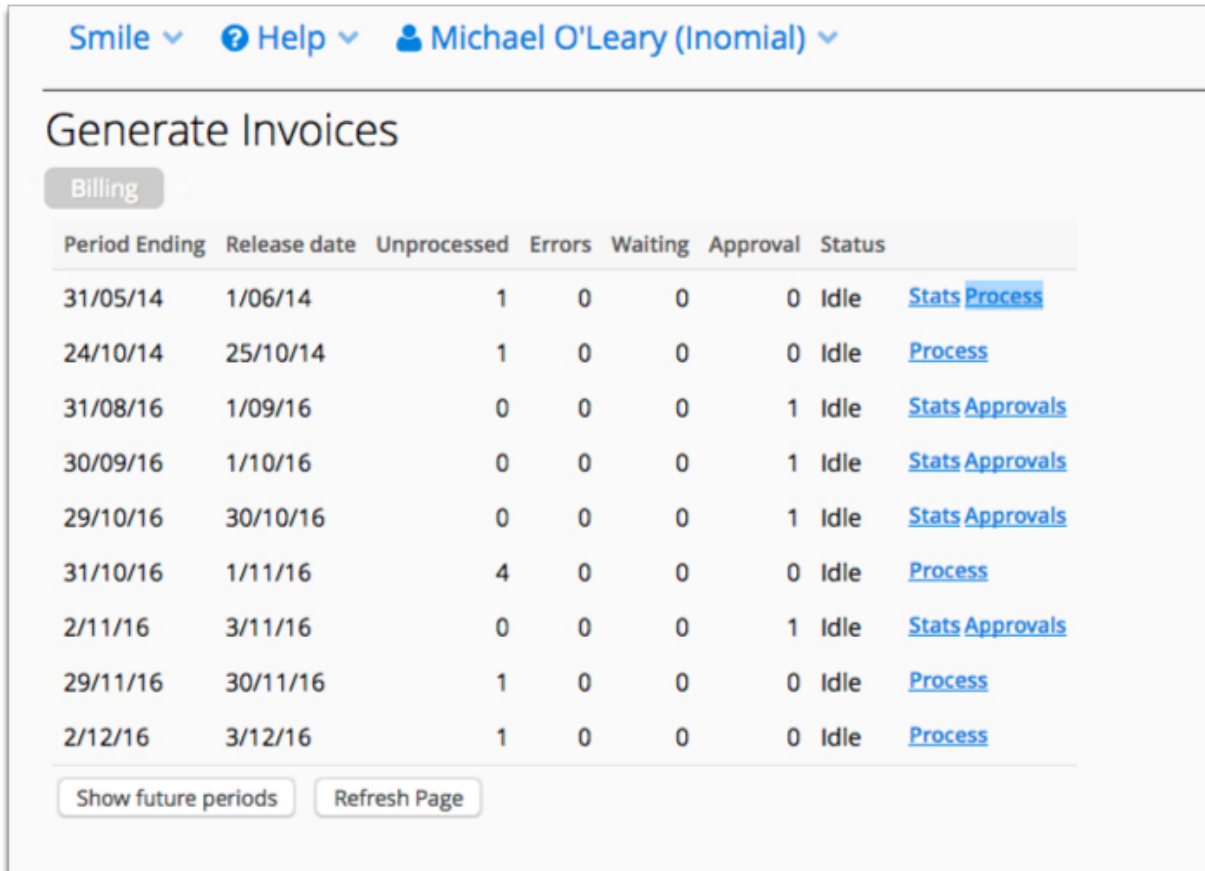
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Generate invoices for all accounts

You can manually generate invoices for accounts in Smile for a specified period.

This task explains how to manually generate invoices for all accounts.

1. On the **Smile** menu, click **Billing**, then click **Generate Invoices**.

   The Generate Invoices page is displayed.

Figure 1: The Generate Invoices page.

2. Click **Process** next to the period for which you want to generate invoices.

   Note: A period cannot be processed if it contains any unresolved import errors.

   Smile generates the invoices and changes the status of each invoicing period to Approval. If Smile cannot process an invoicing period, it changes the status of the invoicing period to Error and continues the billing run. Smile may take some time to generate bulk invoices if there is a lot of data to process.

After all invoices are generated, investigate and resolve any errors in the billing run.

Generate invoices for a specific account

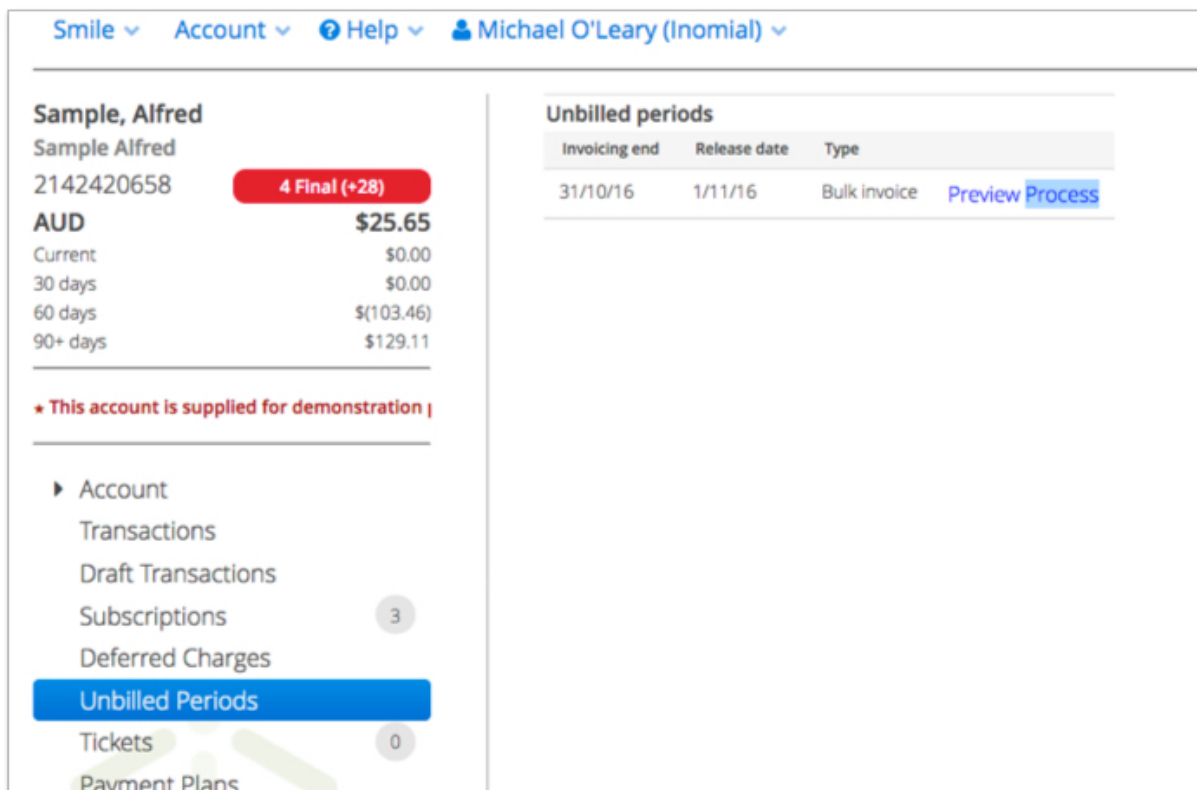You can manually generate invoices for an account for a specified period.

This task explains how to manually generate invoices for a specific account.

1. Search for an account for which you want to create invoices, then double-click the account entry in the search results.
   The Account summary page is displayed.

2. On the Account Menu Tree, click **Unbilled Periods**.
   The Unbilled periods page is displayed.

Figure 2: The Unbilled periods page.

3. Click **Process** next to the period for which you want to generate invoices.
   Smile generates a draft invoice for review and approval.

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Chapter
3

Automated invoices

Configuration of automated invoice generation

You can create a process in Smile that automatically generates invoices at a time, repetition and duration of your choosing.

This task explains how to add a scheduled task to automatically generate invoices.

1. On the **Smile** menu, click **Configuration**.

   The Configuration and Tools page is displayed.

2. Under **Logging and Tasks**, click **Task scheduling**.

   The Tasks page is displayed.

3. Click **New task**.

   A New task page is displayed.

New task

| Configuration and Tools | Tasks |

Name	Auto Generate Invoices
Task Form	autoBillingTask
Runs as	Not Set Change

☑ Enabled

Task schedule

| Starts | Ends | Runs every | Runs every |

This task is not scheduled to run

[Add]
[Run now]
[Save]

Figure 3: The New task **page.**

4. Type a name for the task in the **Name** field.

   In this example the name given is `Auto Generate Invoices.`

5. Type `autoBillingTask` in the **Task Form** field.

   This form name is defined by Inomial.

6. Click **Change** next to **Run as** to set a system services account to run the task.

   The Find User page is displayed.

7. Type `smileBilling` in the **Search for** field, and click **Search**.

   Any account names that fit your search term will be displayed under **Matching Users**.

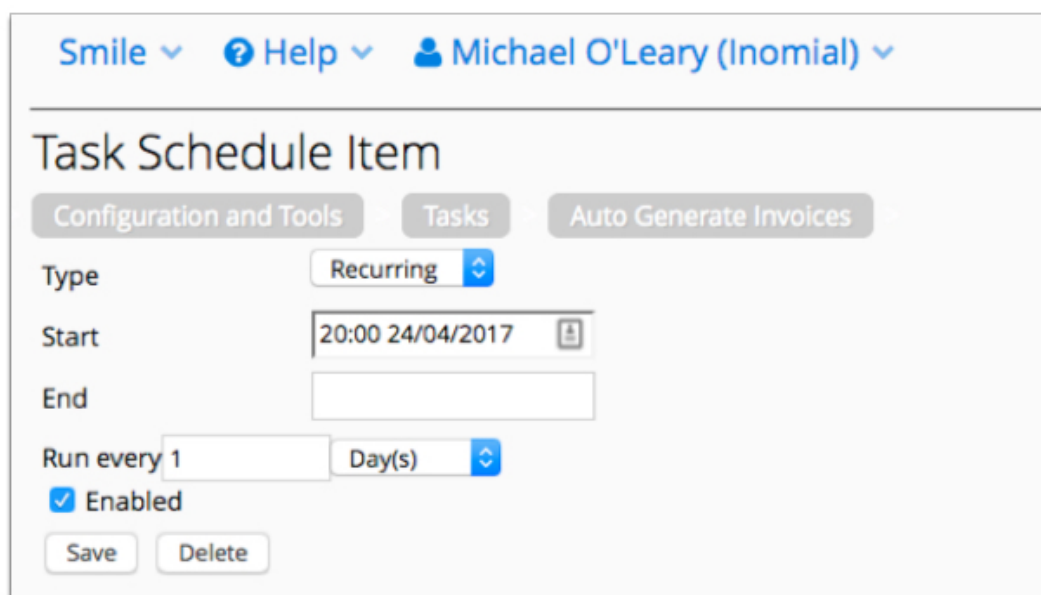8. Click **Select** next to the **smileBilling** entry.

   The Auto Generate Invoices task page is displayed.

9. Click **Add** to set the schedule.

   The Task Schedule Item page is displayed.

10. Configure the schedule as required.

    In this example Smile will automatically generate invoices for all outstanding periods each night at 8pm.

Figure 4: The Task Schedule Item page.

11. Click **Save**, then **Save** again.

    The Tasks page is displayed and the Auto Generate Invoices task is added to the **Task** list.

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Appendix

A

Search

Search

The global **Search** field lets you search for accounts, subscriptions, invoices and receipts, and lets you locate customer information in Smile.

The following table lists the terms you can use in the **Search** field.

Table 1: Search terms for each search type

Search type	Search term
Account	- Contact name - Phone numbers - Address details - USN (unique subscription number)
Subscription	- Username - Past usernames - USN
Invoice	Invoice number
Receipt	Receipt number

A USN, or unique subscription number, uniquely identifies each account and subscription in your company.

This task explains how to search for an account, subscription, invoice or receipt.

1. Do one of the following:

    -   Click in the **Search** field on the Smile Menu Bar.
    -   Press **ALT+S** or **CMD+S**.[1]
    -   On the **Smile** menu, click **Find Customer**.

    The **Search** window is displayed. The most recent previous search results are displayed by default. Double-click a previous result entry to select it.

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[1] Your operating system or browser may override these key-combinations.

2. Type your search term in the **Search** field and press **Enter**.

   A list of results that match your search term appears.

3. Do one of the following:

   - Double-click the required entry in the search results.
   - Select the required entry, then click the 👁 icon.

   - Right-mouse click on the required entry and click **View**.

   Detail of the search result is displayed.

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Appendix
B

Support

Support

All enquiries or support requests are directed to Inomial:

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