

Invoice a Third Party Contract

Purpose: Use this document as a reference for creating and generating corporate invoices in ctcLink.

Audience: Student Financials staff.

 You must have at least one of these local college managed security roles:

- ZZ SF Bill Customers

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Creating a Billing Request


Navigation: Student Financials > Bill Customers > Corporate Bills > Create Billing Request

1. The Billing Request Corp Find an Existing Value page displays.
2. Select the **Add a New Value** tab.
3. Enter the **Business Unit**.
4. Enter **C (Bill Per Contracts)** in the **Bill By Option** field.
5. Select the **Add** button.
6. The Billing Request 1 tab displays.
 - Note that the **Billing Request Nbr** is 9999999999. This will update when the request is saved. Make note of the Billing Request Number to use for the next process (Generate Invoice.)
7. Enter or search for the **Billing ID**.
8. Edit the **Invoice Date** if necessary (default value is the current date).
9. Enter the **Due Date** or **Due Days** when this invoice should be paid.
10. Select the **Invoice per Student** checkbox.
11. In the **Third Party Contract** section, enter or search for the **Contract Number**.
12. In the **Item Due Info** section, enter or search for the **Term**. Then, enter the **Due Date** or **Due Days**.
13. Select the Billing Request 2 tab and the Billing Request 2 tab displays.
14. In the **Bill Term** section:
 - A. Select **One Term** from the **Bill Term** drop-down.
 - B. Enter or search for the **Term** in the **From** field.
15. In the **Print Options** section:

A. **Invoice Layout** field:

- I. **TPC_REF** for the Standard Reference template or
- II. **TPC_SSN** for the the Social Security Number template.

16. Select **XML Publisher** from the **Output Format** drop-down.
17. *Optional:* To include pending aid on the invoice, enter or search for the terms in the **Aid Term From and To** fields.
18. ctcLink recommends selecting the **Override Address Info**, **Address not Required**, and **Print Zero Bill** checkboxes.
19. Select the **Save** button.

 The **Billing Request Nbr** has changed from 9999999999 to its permanent, unique value. Be sure to note this **Billing Request Nbr** in order to use in the next process.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

View Tutorial Via Panopto

View the external link to [Create Billing Request](#). This link will open in a new tab/window.

Generating Invoice

Navigation: Student Financials > Bill Customers > Corporate Bills > Generate Invoice

1. The Generate Invoice run control ID search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
 - NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution

code and a short process description in the Run Control ID is recommended--e.g., WA220_ADM_FYR_5 (Admissions Letter, Summer, FYR Admit Type).

3. The Generate Invoice page displays.
4. Enter the **Business Unit** and **Billing Request Number**.
5. Select the **Run** button. Please refer to the [Process Scheduling](#) QRG for further instructions.

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Printing a Third Party Invoice

Navigation: Student Financials > Bill Customers > Corporate Bills > Print Invoice

1. The **Print Invoice Other Corp** run control search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
 - NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_ADM_FYR_5 (Admissions Letter, Summer, FYR Admit Type).
3. The Corporation Invoice Other page displays.
4. In the Print Options section:
 - A. Enter the **Business Unit**.
 - B. Select **Billing Request Number** from the **Print Invoice by** field.
 - C. Enter the **Billing Request Number** in the **Req NBR** field.
5. In the Override Bill Request section:
 - A. Select the **Override Bill Request Layout** checkbox.
 - B. Enter for search for **TPC_REF** or **TPC_SSN** in the **Invoice Layout** field.

- C. Enter or search for **PRI (Primary Contact)** from the **Contact Type** field.
6. Select the **Run** button. Select the **Print Invoices** checkbox from the **Process List**. Please refer to the [Process Schedule Request](#) steps for further instructions.
7. Please refer to the [Report Manager](#) steps for further instructions.
8. Process complete.

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Third Party Invoice Query

- Please refer to the [Third Party Contract Invoice Query](#) QRG.