



## Online invoices

Online invoices are available to clients who have elected to pay for online services by direct debit when setting up their customer details. Clients can choose to be invoiced at Customer or Branch level. You can choose to receive original invoices via email and you can access a copy of your invoice at any time from our website. Invoices are sent at the beginning of each month detailing all fee bearing services used during the previous month.

**Note** | You will only be sent an original invoice via email if the email Address for Invoices field has been completed for a Customer or Branch. Only an Administrator can record or update this email address and view invoices online.

## Step by step instructions

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## To receive invoices via email

1. Administrators; visit our website and **Logon**
2. Select **User Administration** then **Account Details**
3. Scroll down the screen to find the field called **Email Address for Invoice**
4. Enter the email address that is to receive the invoices then click on **Save**

### Notes

The User Administration option may be located under **My Tools** on some of our websites.

For clients that are invoiced at Branch level the steps are the same but the field you update is in the 'Branch Details' screen. If you do not enter an email address you will be able to view and print copies of invoices from our websites but will not be sent an original invoice.

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## Update address for receiving invoices via email

1. Administrators; visit our website and **Logon**
2. Select **User Administration**, then **Account Details**
3. Scroll down the screen to find the field called **Email Address for Invoice**
4. Empty the field then enter the new email address that is to receive the invoices
5. **Save.**

**Note** | The User Administration option may be located under **My Tools** on some of our websites.

## To get a copy of an invoice

Copies of previous invoices are available to Administrators on the website.

1. Visit any one of our websites and **Logon**
2. Select **User Administration**, then **Invoices**
3. From the 'Invoice Collection' screen click on the icon for the invoice that you want to view.
4. Invoice information is held in two formats.
  - An [Adobe Acrobat PDF](#) version invoice copy. This is the official record and can be used for tax and audit purposes. It is marked as a copy but in all other respects is identical to the invoice that is emailed.
  - A [MS Excel version data file](#). This can be used for sorting transactions or incorporating them into your own accounting or disbursement system to make billing even easier.

## **Notes**

The User Administration option may be located under **My Tools** on some of our websites.

Where there is no PDF icon but simply a message saying 'Posted' this means the invoice is not available electronically as it was posted to a mailing address prior to the introduction of the online service or has been archived (normally for invoices over six months old). You will, however, still have access to the data files (the MS Excel versions) for Posted invoices.