

BILLING AND PAYMENT

INVOICES

The Invoices tab allows you to view all invoices generated for your account, download a report, and pay.

1. Navigate to the **Billing and Payments** section.
2. Invoices have three statuses in the ProControl NextGen platform:
 - a. **Open:** For invoices that have not been paid.
 - b. **Partial Paid:** For invoices that have been paid off partially.
 - c. **Paid:** For invoices that have been fully paid.
3. To download all invoices from your account, either as a PDF or in Excel format, click the **Download** button.
4. To update the date range of invoices, click on **Change** and select the desired time frame.
 - a. **All Invoices:** Shows open, partially paid and closed invoices in the last 6 months.
 - b. **Specific Invoices:** Shows open and partially paid invoices.
5. To pay multiple invoices, click the **Pay Invoices** button. After selecting the invoices to pay, this button will navigate you to a separate tab and direct you to BillTrust via a single sign-on to collect payment.
6. Once you have clicked the Invoices tab, click the **Arrow** (located on the far right) on the required line item to view the invoice details. Click the required line item to view more information about a specific invoice or pay an invoice.
7. When viewing the invoice, you will notice the following information displayed front and center:
 - a. **Invoice Numbers:** These are auto-generated with 9 digits hyphen 3 digits (xxxxxxxxx-xxx) format; this format distinguishes invoices from contracts.
 - b. **Invoice Payments:** Are executed through the third-party site, BillTrust.
 - c. **Purchase Order information:** Some invoices contain a primary purchase order number associated with them.

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8. From there, scroll down the invoice to view the **Job Number** and **Job site** details. Under that, you can view the **Servicing Branch, Equipment** on rent, and **Invoice Totals** details.
9. Click the **Ellipsis (three horizontal dots)** on each invoice to perform the following actions:
 - a. Pay
 - b. Download
 - c. Email
 - d. Manage purchase orders
10. To pay or download the invoice directly, click the **Pay Invoice** or **Download** buttons under the Invoice Number.
 - a. You can also pay and download invoices by the line-item level.
 - b. All invoices can also be paid via the Herc Rentals mobile app.
11. Click the **Manage Purchase Orders** button to add or manage purchase orders for the invoice.
 - a. The **Manage Purchase Orders** screen will display, and you can view the purchase order associated with the invoice.
 - b. Click the **Add PO** button to add another PO to the invoice, and select the PO checkboxes as required.
 - c. Click the **Add PO** button.
 - d. Add the split percentage for each PO in the **Split** fields.
 - e. Select the **Star** icon next to the PO # you want to select as the primary PO for this invoice.
 - f. Click the **Save** button.
 - g. A “Purchase Orders successful saved” message will confirm that the PO is saved to the invoice.
12. To get an aggregated view of all the invoices in one corporate account, select more than one subsidiary account in the **Account** drop down and click the Apply button.
13. An aggregated view of all the selected accounts will display. The view is different from a single account as the **Account Summary** and **Purchase Orders** sections are not available in this view.