

## Organization – Authorize and Pay for Purchases on behalf of an Individual

This tutorial walks a representative of an organization through the steps to review and make a payment on an invoice that is sent when an individual makes a purchase on Council Connect and has requested that the invoice be routed to a related organization for payment. Steps to reject or void an invoice are also included.

Common scenarios where an individual may request that an organization be invoiced for a Council Connect purchase include:

1. An employee of an organization registers for a Safety Codes Council course or exam;
2. An individual makes a purchase related to his or her certification or designation of powers (new, renewal, reinstatement, amendment);
3. An employee of an organization purchases a product or publication (e.g. replacement ID card, ME exam kit, Private Sewage Handbook) necessary for his or her work from the Safety Codes Council.



**Tip:** An individual must have a relationship established with an organization (e.g. Employee, Trainee, QMP Manager, Account Admin, Designation of Powers, etc.) in order to use the functionality to request an organization be invoiced for a purchase made through Council Connect.

This tutorial begins with the assumption that an individual has made a purchase via the online store in Council Connect and has selected an organization to send the bill to. Steps related to receiving an email notification of the request to making a payment, paying all or part of the invoice, redirecting the invoice to another individual in the organization and voiding or rejecting an invoice are detailed in this tutorial.

Refer to the [Request Organization be Billed for Purchase](#) tutorial for more information on how an individual requests that an organization be billed for a purchase made in Council Connect by the individual.

## Receiving Email Notification of an Invoice to Pay



Tue 23/04/2019 4:31 PM

sccinfo@safetycodes.ab.ca

**New Proforma Invoice #220016**

To milesjax@shaw.ca; Cheryl Bozek

Safety Codes Council

This message is to confirm the receipt of the following recent order.

**Customer's Name:** Mr. Miles Jax

**Date:** 4/23/2019

**Invoice #:** 220016

**Invoice Date:** 4/23/2019 4:30:43 PM

**Total:** \$425.00

**Payment Amount:** \$

**Balance:** 425.00

**authorization:**

**Reference Number:**

**Bill To:**

-----  
My Southern Municipality  
45 Miller Boulevard  
Lethbridge AB T7H 2R4  
CANADA

**Payment Method:**

Customer Invoice Qty	Item	Price	Discount	Taxes	Shipping	Sub-Total	Paid	Balance
Jax Miles 220016 1.00	Course: 100165 Fire, Building Construction & Protection Systems, AFC 2014	375.00	0.00	0.00	0.00	375.00	0.00	375.00
Jax Miles 220016 1.00	Materials (online): 100165 Fire, Building Construction & Protection Systems, AFC 2014	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jax Miles 220016 1.00	SCO Pre-Qualification Review Fee	50.00	0.00	0.00	0.00	50.00	0.00	50.00

1. When an individual (purchaser) requests that an organization be billed for a purchase, an organization contact must be specified. That contact and the purchaser will receive an email notification of the invoice that is awaiting payment.
  - a. The name of the purchaser is displayed on the email as is the amount owing and the item(s) purchased.



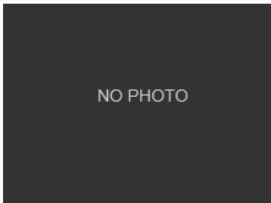
**Tip:** An invoice may contain multiple line items for different types of purchases (e.g. a course or exam registration, a publication, a certification related purchase).

## Viewing Invoice Details in Council Connect

My Account **Organization Info** Courses/ Exams Learning Path Online Store Credential Search Help

### Organization Dashboard Go Back

You have access to multiple organizations. [\[ Change organizations \]](#)



Customer Number: 228244  
403-568-7457

**Details** Your role: QMP Manager

**Name:** My Southern Municipality  
Type: Municipality

45 Miller Boulevard  
Lethbridge, AB T7H 2R4

**My Account Links**

- [My Organization Dashboard](#)
- [My Organization Information](#)
- [My Applications](#)
- [My Accreditation Status](#)
- [My DOP List](#)
- [My QMP](#)
- [Organization Financial Transactions](#)
- [My Financial Transactions](#)
- [My Requests](#)
- [My Communications](#)
- [My Audit Report](#)

**My Accreditation Status**

Discipline	Accreditation Number	Scope	Order Number	Status	Accreditation Date	Issue Date	Effective Date	Order Of Accreditation
No data available								

**My Open Applications**

Application Type	Start Date	Status
No data available		

[Apply Now](#) [Add Joint Accreditation](#)

**QMPs**

QMP Status	Received Date	Approved Date	Accreditations	Document	QMP Manager
No data available					

2. Log into Council Connect and navigate to the desired Organization Dashboard.

Council Connect Welcome, Ms. Cheryl The SCO (Sign Out) Cart My Account

My Account Organization Info Courses/ Exams Learning Path Online Store Credential Search Help

### My Financial Transactions (My Southern Municipality)

Back to My Organization Dashboard My Account Menu -

Pay Open Items Void Open Items

**My Open Invoices**

Invoice	Date	Total	Paid	Balance Due	Customer	Contact	
<b>220016</b>	04/23/2019	\$425.00	\$0.00	\$425.00	Mr. Miles Jax	Ms. Cheryl The SCO	View Details Add to Cart

**All Invoices**

Invoice	Date	Total	Paid	Balance Due	Customer	Contact	
220016	04/23/2019	\$425.00	\$0.00	\$425.00	Mr. Miles Jax	Ms. Cheryl The SCO	View Details
220014	04/23/2019	\$375.00	\$375.00	\$0.00	Mr. Miles Jax	Ms. Cheryl The SCO	View Details

**Products**

Invoice #	Tracking #	Product Name	Product Price	Returned Cancelled	Date Paid
-----------	------------	--------------	---------------	-----------------------	-----------

1. Click **My Financial Transactions** on the **My Account Links** menu
  - a. **My Open Invoices** shows invoices that are awaiting payment

Council Connect Welcome, Ms. Cheryl The SCO (Sign Out) Cart My Account

My Account Organization Info Courses/ Exams Learning Path Online Store Credential Search Help

### Invoice Details

Go Back

**Invoice #: 220016** Add to Cart

Invoice Date: 04/23/2019

Tracking #: - not available - Print Invoice

**Invoice Total: \$425.00**

Paid: \$0.00

Due: \$425.00

**Line Items**

Product	Registrant	Price	Qty	Shipped	Paid
Course: 100165 Fire, Building Construction & Protection Systems, AFC 2014	Jax Miles	\$375.00	1		No
Materials (online): 100165 Fire, Building Construction & Protection Systems, AFC 2014		\$0.00	1		Yes
SCO Pre-Qualification Review Fee		\$50.00	1		No

**Payment**

Paid For:	Paid Amount	Date	Method
No data to display at the moment.			

**Shipping**

Product	Shipping Amount	Notes
No data to display at the moment.		

**Taxes**

Tax	Tax Amount
No data to display at the moment.	

2. Click the invoice number or the **View Details** button to review the purchases made and the amounts owing on the invoice
  - a. Click the **Print Invoice** button to print a hard copy



**Tip:** Invoices will remain in the organization’s shopping cart until or if they are paid or voided.

## Route the Invoice to a Different Organization Contact

My Financial Transactions ([Online Permits and Inspections](#))

[Back to My Organization Dashboard](#)

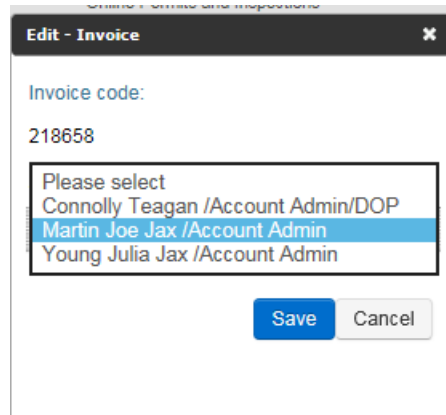
[My Account Menu](#) ▾

[Pay Open Items](#)

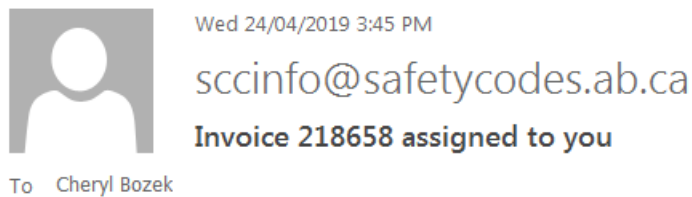
[Void Open Items](#)

My Open Invoices						
Invoice	Date	Total	Paid	Balance Due	Customer	Contact
218658	11/13/2018	\$450.00	\$0.00	\$450.00	Online Permits and Inspections	Joe Jax Martin
218645	11/05/2018	\$885.00	\$0.00	\$885.00	Online Permits and Inspections	Julia Jax Young

3. The organization contact who was selected to receive the invoice at the time of purchase can be changed
  - a. Click the name of the individual who is specified as the invoice contact under **My Open Invoices**.





4. A form with a dropdown list of the organization’s QMP Manager and Account Admins is displayed
  - a. Choose the desired person to route the invoice to and click **Save**.



Dear Ms. Cheryl The SCO: The invoice 218658 has been assigned to you.

5. A notification email will be sent automatically to the new contact person.

## Pay the Invoice in Full

Council Connect
Welcome, Ms. Cheryl The SCO (← Sign Out)   My Account

My Account   Organization Info   Courses/ Exams   Learning Path   Online Store   Credential Search   Help

Shopping Cart - Open Invoices | [Add](#)

[Invoice Totals](#)




---

Net Total:	425.00
Total Shipping:	0.00
Total Tax:	0.00
Total Discount:	0.00
Total Paid:	0.00
Balance Due:	425.00

[Invoice Detail](#)

---

Customer: Jax Miles  
 Transaction Date: 4/23/2019  
 Invoice code: 220016  
 Proforma? Yes

Invoice Items	Quantity	Price	Tax	Shipping	Discount	Net Total	Paid Amount	Balance Due
 <a href="#">Course: 100165 Fire, Building Construction &amp; Protection Systems, AFC 2014</a>	1.00	375.00	0.00	0.00	0.00	375.00	0.00	375.00
 <a href="#">Materials (online): 100165 Fire, Building Construction &amp; Protection Systems, AFC 2014</a>	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
 <a href="#">SCO Pre-Qualification Review Fee</a>	1.00	50.00	0.00	0.00	0.00	50.00	0.00	50.00

Add To Cart

© 2018 Safety Codes Council. All Rights Reserved.

6. Click the **Add to Cart** button to add the invoice line items (purchases) to the online store shopping cart
  - a. Review the shopping cart details to ensure they are correct
  - b. Click the **Add to Cart** button to proceed with payment
  - c. To pay all items on the invoice at once, click **Check-Out**
  - d. Complete the payment information
  - e. Click the **Continue** button
  - f. Review the shopping card details
  - g. Click the **Submit Order** button
  - h. Click the **Print this page** button to print a hard copy of the receipt

**Note:** Refer to the tutorial in HELP for detailed instructions on how to [make a payment](#).



Wed 24/04/2019 9:17 AM

sccinfo@safetycodes.ab.ca

New Payment #210173

To Cheryl Bozek

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Safety Codes Council

**This message is to confirm the receipt of the following recent order.**

**Customer's Name:** Ms. Cheryl The SCO  
**Date:** 4/24/2019

**Transaction Date:** 4/24/2019 9:16:53 AM

**Total:** \$425.00  
**Payment Amount:** \$425.00  
**Balance:** 0.00

authorization:  
Reference Number: 82925599558451390

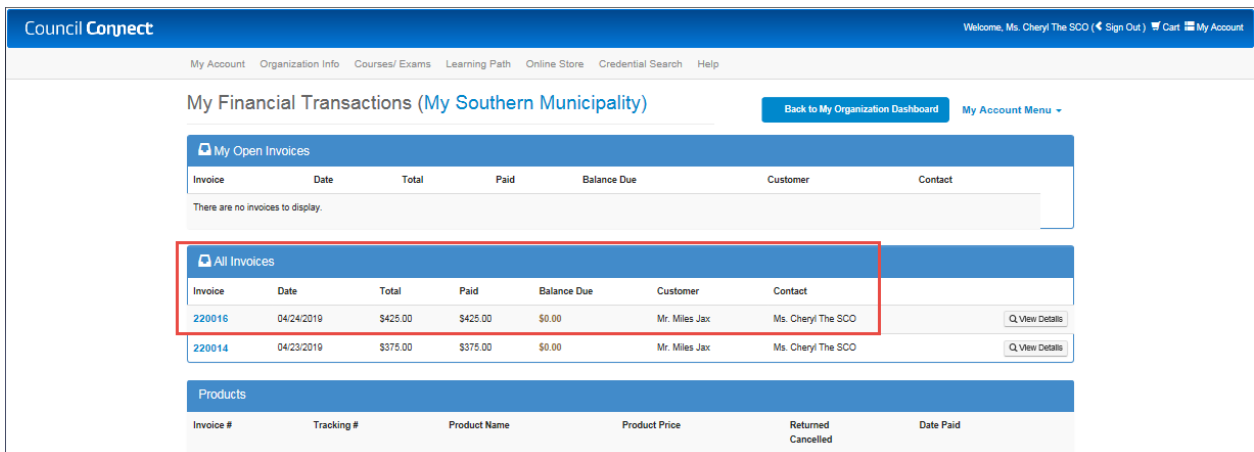
**Bill To:**

-----  
My Southern Municipality  
45 Miller Boulevard  
Lethbridge AB T7H 2R4  
CANADA

**Payment Method:** Visa

Customer Invoice Qty	Item	Price	Discount	Taxes	Shipping	Sub-Total	Paid	Balance
Jax Miles 2200161.00	Course: 100165 Fire, Building Construction & Protection Systems, AFC 2014	375.00	0.00	0.00	0.00	375.00	375.00	0.00
Jax Miles 2200161.00	Materials (online): 100165 Fire, Building Construction & Protection Systems, AFC 2014	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jax Miles 2200161.00	SCO Pre-Qualification Review Fee	50.00	0.00	0.00	0.00	50.00	50.00	0.00

7. A confirmation email will be sent to both the organization contact and the purchaser when the invoice has been paid.
  - a. Council will process the transaction(s) once the invoice items have been paid in full.



**Council Connect** | Welcome, Ms. Cheryl The SCO (Sign Out) | Cart | My Account

My Account | Organization Info | Courses/ Exams | Learning Path | Online Store | Credential Search | Help

### My Financial Transactions (My Southern Municipality)

[Back to My Organization Dashboard](#) | [My Account Menu](#)

**My Open Invoices**

Invoice	Date	Total	Paid	Balance Due	Customer	Contact
There are no invoices to display.						

**All Invoices**

Invoice	Date	Total	Paid	Balance Due	Customer	Contact	
220016	04/24/2019	\$425.00	\$425.00	\$0.00	Mr. Miles Jax	Ms. Cheryl The SCO	<a href="#">View Details</a>
220014	04/23/2019	\$375.00	\$375.00	\$0.00	Mr. Miles Jax	Ms. Cheryl The SCO	<a href="#">View Details</a>

**Products**

Invoice #	Tracking #	Product Name	Product Price	Returned Cancelled	Date Paid
-----------	------------	--------------	---------------	-----------------------	-----------

8. Paid invoices will display in the **All Invoices** category under **My Financial Transactions** (on both the Organization's and the original purchaser's dashboards in Council Connect).
  - a. Click the Invoice number or the **View Details** button to review the details and print a copy of the receipt if required.

## Make a Partial Payment on the Invoice

Shopping Cart - Open Invoices | [Add](#)

[Invoice Totals](#)

Net Total: 373.00  
 Total Shipping: 0.00  
 Total Tax: 13.00  
 Total Discount: 0.00  
 Total Paid: 0.00  
 Balance Due: 373.00

[Invoice Detail](#)

Customer: Martin Joe Jax  
 Transaction Date: 4/24/2019  
 Invoice code: 220019  
 Proforma? Yes

Invoice Items <span style="float: right;">✕</span>									
	Item	Quantity	Price	Tax	Shipping	Discount	Net Total	Paid Amount	Balance Due
ⓧ	SCO Application Fee - Fire	1.00	75.00	0.00	0.00	0.00	75.00	0.00	75.00
ⓧ	DOP Certificate Replacement	1.00	25.00	0.00	0.00	0.00	25.00	0.00	25.00
ⓧ	Fire Alarm Systems Guide	2.00	130.00	13.00	0.00	0.00	273.00	0.00	273.00
ⓧ	Free Shipping	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

[Add To Cart](#)

9. After clicking **Add to Cart**, the Invoice Details area shows all line items included on the invoice
10. Click the **X** beside a line item to remove it from the invoice before making payment (this is considered a partial invoice payment).
  - a. The deleted item will remain on the open invoice but will be removed from this shopping cart transaction.

Online Store Shopping Cart

Shopping Cart | [View](#)

One line item was removed from the shopping cart but remains on the invoice

[Update info and continue to payment](#)

[Return to dashboard](#)

[Continue to Shop](#)

[Check-Out](#)

Line Items <span style="float: right;">✕</span>									
	Item	Quantity	Price	Tax	Shipping	Net Total	Paid Amount	Balance Due	
ⓧ	220019 SCO Application Fee - Fire	1.00	75.00	0.00	0.00	75.00	0.00	75.00	
ⓧ	220019 DOP Certificate Replacement	1.00	25.00	0.00	0.00	25.00	0.00	25.00	
ⓧ	220019 Application Renewal Late Fee	1.00	25.00	0.00	0.00	25.00	0.00	25.00	

[Cart Total](#)

Subtotal: 125.00  
 Total tax: 0.00  
 Total shipping: 0.00  
 Net Total: 125.00  
 Total Paid: 0.00  
 Balance Due: 125.00

All Amounts are in Canadian Dollars

[Return to dashboard](#)

[Continue to Shop](#)

[Check-Out](#)



11. Click **Check-out** to pay the remaining items on the invoice
  - a. Review the shopping cart details to ensure they are correct
  - b. Click the **Add to Cart** button to proceed with payment
  - c. Complete the payment information
  - d. Click the **Continue** button
  - e. Review the shopping card details
  - f. Click the **Submit Order** button
  - g. Click the **Print this page** button to print a hard copy of the receipt

**Note:** Refer to the tutorial in HELP for detailed instructions on how to [make a payment](#).

12. A confirmation email will be sent to both the organization contact and the purchaser when a partial payment has been made on an invoice has been paid. Council will process the transaction(s) that were paid on the invoice.

### My Financial Transactions ([Online Permits and Inspections](#))

[Back to My Organization Dashboard](#)
[My Account Menu](#)
[Pay Open Items](#)
[Void Open Items](#)

My Open Invoices						
Invoice	Date	Total	Paid	Balance Due	Customer	Contact
220020	04/24/2019	\$175.00	\$0.00	\$175.00	Mr. Miles Jax	Ms. Cheryl The SCO
220019	04/24/2019	\$373.00	\$100.00	\$273.00	Joe Jax Martin	Ms. Cheryl The SCO

Notice a partial payment was made on this invoice, balance owing is \$100 and \$273 was paid

13. The invoice that was partially paid will remain in the organization's **My Financial Transactions/My Open Invoices** list and will show the invoice total, amounts paid and the remaining balance due.

### Void Invoice Lines [Select and Void](#)

Organization name: Online Permits and Inspections

Select/Unselect All

Invoice	Line Item	Purchased on behalf of	Invoice Contact	Quantity	Price	Net Total	Paid Amount	Balance Due
<input type="checkbox"/>	220020 Free Shipping	Mr. Miles Jax	Ms. Cheryl The SCO	1.00	0.00	0.00	0.00	0.00
<input type="checkbox"/>	220020 Certification Amendment	Mr. Miles Jax	Ms. Cheryl The SCO	1.00	25.00	25.00	0.00	25.00
<input type="checkbox"/>	220020 Barrier Free Design Guide 2017	Mr. Miles Jax	Ms. Cheryl The SCO	3.00	50.00	150.00	0.00	150.00

[Cancel](#)
[Void Items](#)

14. If you now click the **Void Open Items** button the invoice with a partial payment will not be available to void while other open invoices that have not had a payment made will be listed.

## Void or Reject All Open Invoices and Line Items

My Financial Transactions (Online Permits and Inspections)

Back to My Organization Dashboard

My A

Void Open Items

Pay Open Items

Void Open Items

My Open Invoices						
Invoice	Date	Total	Paid	Balance Due	Customer	Contact
220020	04/24/2019	\$175.00	\$0.00	\$175.00	Mr. Miles Jax	Ms. Cheryl The SCO
220019	04/24/2019	\$373.00	\$0.00	\$373.00	Joe Jax Martin	Ms. Cheryl The SCO

15. On the My Financial Transactions page, click **Void Open Items**

- A list of all line items that are on all invoices that have not yet been paid and that are eligible to be voided is displayed



**Tip:** If you wish to void some line items on an invoice, this must be done before any payments (e.g. a partial payment or a payment of only one line item) is made.

Void Invoice Lines | [Select and Void](#)

Organization name: Online Permits and Inspections

Select/Unselect All

	Invoice	Line Item	Purchased on behalf of	Invoice Contact	Quantity	Price	Net Total	Paid Amount	Balance Due
<input checked="" type="checkbox"/>	220019	Free Shipping	Joe Jax Martin	Ms. Cheryl The SCO	1.00	0.00	0.00	0.00	0.00
<input checked="" type="checkbox"/>	220019	DOP Certificate Replacement	Joe Jax Martin	Ms. Cheryl The SCO	1.00	25.00	25.00	0.00	25.00
<input checked="" type="checkbox"/>	220019	SCO Application Fee - Fire	Joe Jax Martin	Ms. Cheryl The SCO	1.00	75.00	75.00	0.00	75.00
<input checked="" type="checkbox"/>	220019	Fire Alarm Systems Guide	Joe Jax Martin	Ms. Cheryl The SCO	2.00	130.00	260.00	0.00	260.00
<input checked="" type="checkbox"/>	220020	Free Shipping	Mr. Miles Jax	Ms. Cheryl The SCO	1.00	0.00	0.00	0.00	0.00
<input checked="" type="checkbox"/>	220020	Certification Amendment	Mr. Miles Jax	Ms. Cheryl The SCO	1.00	25.00	25.00	0.00	25.00
<input checked="" type="checkbox"/>	220020	Barrier Free Design Guide 2017	Mr. Miles Jax	Ms. Cheryl The SCO	3.00	50.00	150.00	0.00	150.00

Cancel

Void Items

16. To void all items at once, click the **Select/Unselect All** checkbox

- A checkmark will be placed in the box to the left of all line items on the invoice

17. Click the **Void Items** button

18. Click **ok** on the confirmation message that appears

- The voided invoices will no longer display on the **My Financial Transactions, My Open Invoices** list

## Void or Reject Individual Line Item(s) on an Invoice

### Void Invoice Lines | [Select and Void](#)

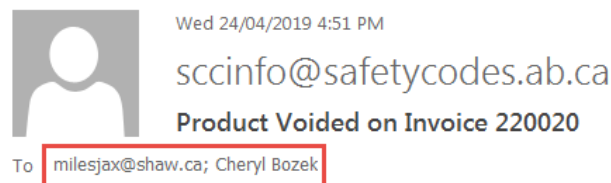
Organization name: Online Permits and Inspections

Select/Unselect All

Invoice	Line Item	Purchased on behalf of	Invoice Contact	Quantity	Price	Net Total	Paid Amount	Balance Due
<input type="checkbox"/>	220020 Free Shipping	Mr. Miles Jax	Ms. Cheryl The SCO	1.00	0.00	0.00	0.00	0.00
<input checked="" type="checkbox"/>	220020 Certification Amendment	Mr. Miles Jax	Ms. Cheryl The SCO	1.00	25.00	25.00	0.00	25.00
<input type="checkbox"/>	220020 Barrier Free Design Guide 2017	Mr. Miles Jax	Ms. Cheryl The SCO	3.00	50.00	150.00	0.00	150.00

Cancel **Void Items**

19. On the Void Invoice Lines screen
  - a. Click the checkbox next to the invoice line item you wish to void or reject paying
  - b. Click **Void Items**
  - c. Click **ok** on the confirmation message



Dear Mr. Miles Jax: Your product Certification Amendment on Invoice 220020 was voided. Please contact your Organization Invoice Contact Ms. Cheryl The SCO through email [cheryl.bozek@safetycodes.ab.ca](mailto:cheryl.bozek@safetycodes.ab.ca).

20. An email notification advising of the product or invoice line item that was voided will be sent to the purchaser and to the organization contact.

### My Financial Transactions ([Online Permits and Inspections](#))

[Back to My Organization Dashboard](#)

[My Account Menu](#) ▾

[Pay Open Items](#)

[Void Open Items](#)

My Open Invoices						
Invoice	Date	Total	Paid	Balance Due	Customer	Contact
220020	04/24/2019	\$150.00	\$0.00	\$150.00	Mr. Miles Jax	Ms. Cheryl The SCO
220019	04/24/2019	\$373.00	\$100.00	\$273.00	Joe Jax Martin	Ms. Cheryl The SCO

21. The invoice will remain in the **My Open Invoices** list showing the adjusted total owing
  - a. The voided line item(s) no longer show on the **Invoice Details** screen
  - b. The purchaser will need to reorder the product if still required

## Additional Information

If an invoice for a certification renewal is not paid by the certification expiry date late fees apply. The late fees may be reflected on a single invoice or on a separate invoice, depending on when the invoice is generated (before or after the expiry date).