

Request Organization be Invoiced for Purchase

This tutorial walks an individual through the steps to request that a related organization (employer typically) be invoiced for a purchase made in Council Connect by the individual.

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

- An employee of an organization registers for a Safety Codes Council course or exam;
- A Safety Codes Officer or Master Electrician makes a purchase related to his or her certification or designation of powers (new, renewal, reinstatement, amendment);
- 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. Relationships are established and maintained by the Council upon request by an organization's QMP Manager.

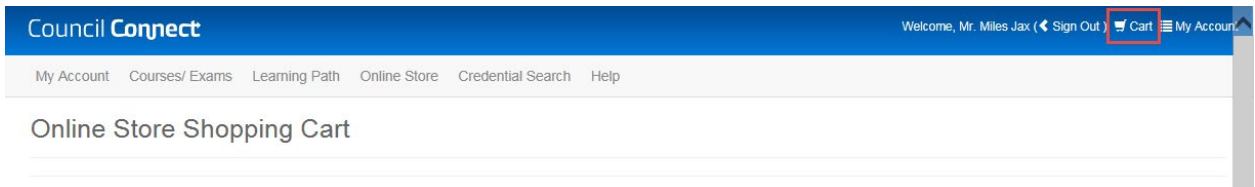
This tutorial begins with the assumption that a purchase is being made via the online store in Council Connect (including payment for a new or renewal certification application) for which the purchaser wishes to have a third party (usually the employer) pay.



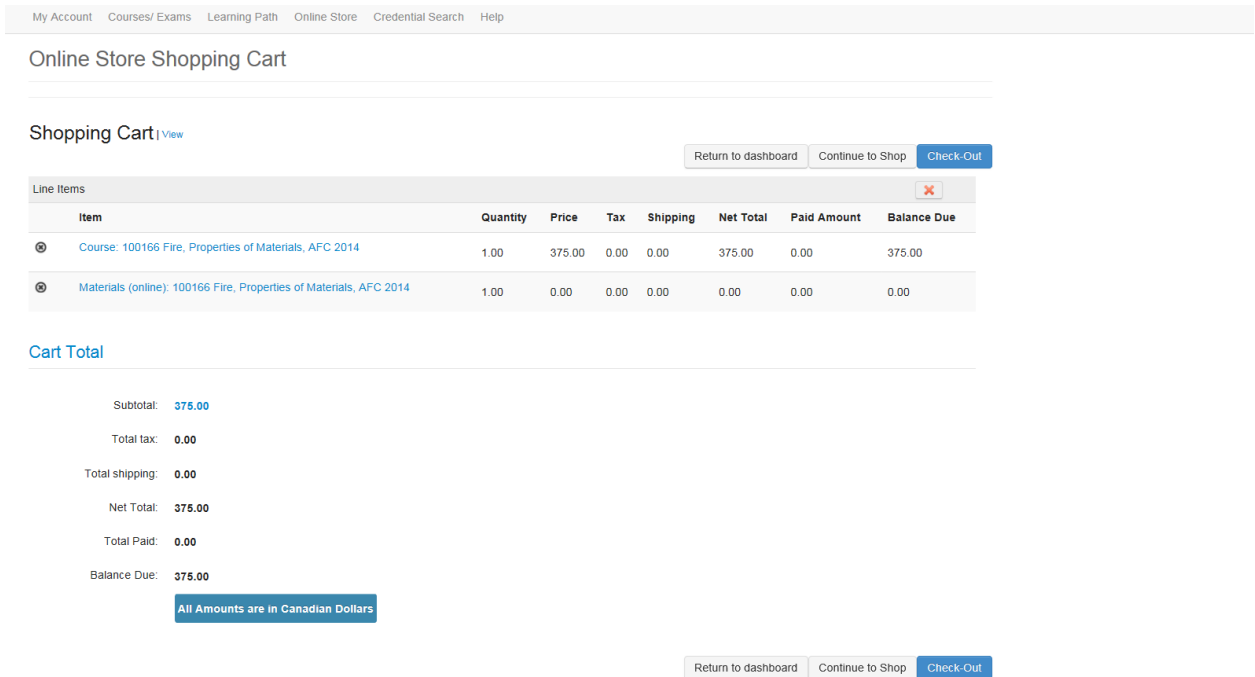
Tip: You can add multiple items to the shopping cart (from any task requiring payment), then once you have added the last item, you can request that a related organization be billed for all items in the cart.

Note: When checking out, you may have additional items in your shopping cart from previous transactions. If you do not want these previous transactions included on the invoice generated for a third party to be billed for you should either remove the items from the cart or pay for them in a separate transaction before you request that a third party be billed for some purchases.

Access Shopping Cart

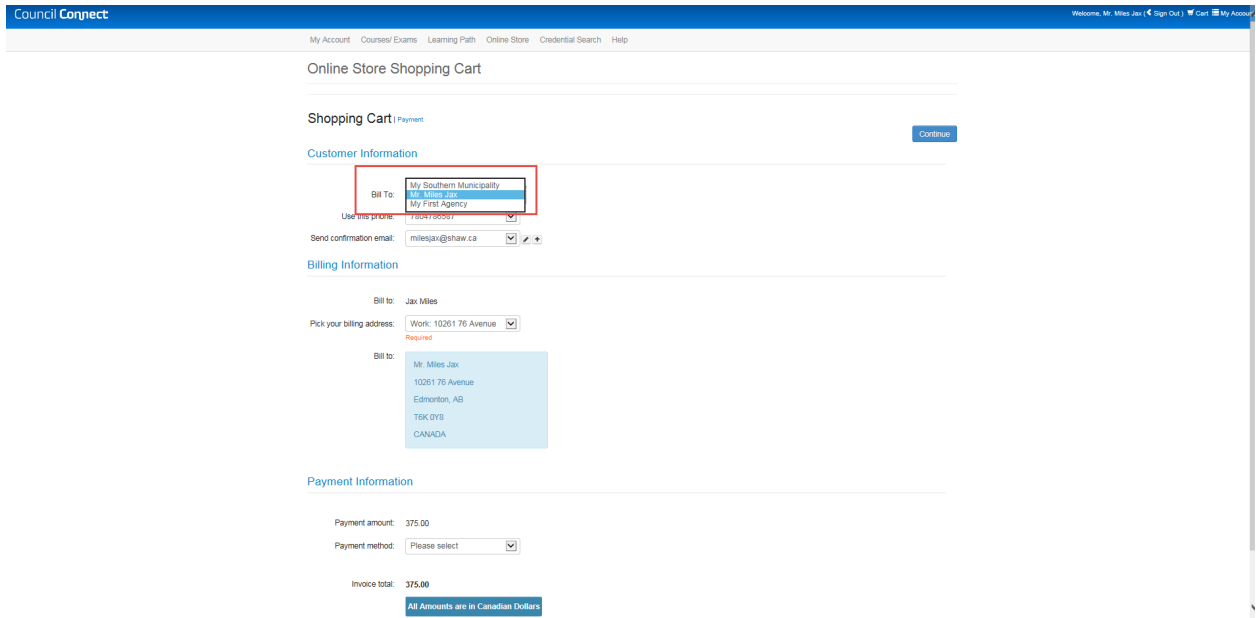


1. Access the shopping cart by clicking the **Cart** link in the upper right corner of any Council Connect page (e.g. My Account/My Dashboard, Online Store, Courses/Exams, etc.)



2. Review the items in the cart and ensure only those you wish to have a third party pay for remain before completing the steps below
 - a. To remove items from the shopping cart, click the black X (at the left of a line item) to remove a single item
 - Or,
 - b. Click the red X (at the top right of the **Shopping Cart** page) to remove all items
 - c. Click **OK** (to remove all items)
3. Complete the steps below to start the process of billing a third party:
 - a. Click the **Check Out** button to proceed to check out the items that remain in the cart

Shopping Cart – Payment Information



Council Connect

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

Welcome, Mr. Miles Jax (Sign Out) Cart My Account

Online Store Shopping Cart

Shopping Cart | Payment Continue

Customer Information

Bill To: My Southern Municipality
My Municipality
My First Agency

Use the phone: 7804788887

Send confirmation email: milesjax@shaw.ca

Billing Information

Bill to: Jax Miles

Pick your billing address: Work: 10261 76 Avenue

Bill to: Mr. Miles Jax
10261 76 Avenue
Edmonton, AB
T6K 0Y3
CANADA

Payment Information

Payment amount: 375.00

Payment method: Please select

Invoice total: 375.00

All Amounts are in Canadian Dollars

4. From the Shopping Cart | Payment page:
 - a. Click **Bill To** to display a list of related organizations to bill for payment of the items being purchased

 **Tips:**

- If there are no options to bill an organization in the list, contact your employer and explain the issue. Your organization's QMP manager may contact the Council to request that the appropriate relationship/permissions be established to allow you to request payment from the organization
- Mixing and matching of products to bill to more than one organization is not allowed. The organization selection will be for ALL products that are in the cart at the time of check-out
- If the individual wishes to pay for certain products that are in his or her shopping cart him or herself, the purchase must be done as a completely separate transaction

Online Store Shopping Cart

Shopping Cart | [Payment](#)[Continue](#)

Customer Information

Bill To: My Southern Municipality Use this phone: 7804786587 Send confirmation email: milesjax@shaw.ca  

Billing Information

Bill to: My Southern Municipality

Org invoice contact:
SCO Cheryl The /QMP ManagerPick your billing address: Home: 45 Miller Boulevard

Required

Bill to:
My Southern Municipality
45 Miller Boulevard
Lethbridge AB T7H 2R4
CANADA

Payment Information

Bill Organization:

By selecting this option, your payment will need to be completed by the selected organization. Click on continue to complete check out process.

Invoice total: 375.00

- In the Billing Information area, click **Org Invoice contact** and choose the individual at the organization to direct the invoice to

 **Tips:**

- Once an Organization contact is selected and the invoice has been created, the individual that made the purchase will not be able to change the contact him or herself. The contact specified can however redirect to a different organizational contact once the invoice is received.
- After an organization is selected from the Bill To dropdown, the payment information section where credit card details are entered will no longer be visible
- Do not uncheck the **Bill Organization** checkbox unless you have changed your mind and now wish to pay for the purchase yourself (in which case you will also need to change the Bill To box back to your name)

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

Online Store Shopping Cart

Shopping Cart | [Confirm your order](#)

[Edit Payment](#) [Submit Order](#)

Order is not complete. Press "Submit Order" to complete.

Line Items	Quantity	Price	Tax	Shipping	Net Total	Paid Amount	Balance Due
Ⓜ Course: 100166 Fire, Properties of Materials, AFC 2014	1.00	375.00	0.00	0.00	375.00	0.00	375.00
Ⓜ Materials (online): 100166 Fire, Properties of Materials, AFC 2014	1.00	0.00	0.00	0.00	0.00	0.00	0.00

Billing/Shipping Information

Customer name: Jax Miles

Billing name: My Southern Municipality

Phone: 7804786587

Email: milesjv@shaw.ca

Contact: SCC Cheryl The

Ship to:

Bill to:

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

Payment Information

Sub Total: 375.00

Total shipping: 0.00

Total tax: 0.00

Credits Applied: 0.00

Payments Previously Applied: 0.00

Net Applied: 0.00

Net Total: 375.00

Balance Due: 375.00

account number:

Email Confirmation?

Order is not complete. Press "Submit Order" to complete.

[Edit Payment](#) [Submit Order](#)

6. From the **Payment confirmation** page:
 - a. Review the details in the **Billing/Shipping Information** area
 - b. Click the **Edit Payment** button to make any necessary changes in the previous screens
 - c. Once all is correct, click **Submit Order** to continue with the purchase.

[My Account](#) [Courses/ Exams](#) [Learning Path](#) [Online Store](#) [Credential Search](#) [Help](#)

Online Store Shopping Cart

Purchase Details				
Item	Price	Qty	Tax	Shipping
Course: 100166 Fire, Properties of Materials, AFC 2014	375.00	1.00	0.00	0.00
Materials (online): 100166 Fire, Properties of Materials, AFC 2014	0.00	1.00	0.00	0.00

[Return to Dashboard](#) [Continue Shopping](#)

Shopping Cart | [Receipt](#)

Thank you for your order.

Confirmation #:

Invoice #:220014

You may print this page for your records.

[Print this page](#)

Billing/Shipping Information

Billing label: My Southern Municipality
45 Miller Boulevard
Lethbridge AB T7H 2R4
CANADA

Payment Information

Sub Total: 375.00

Total Shipping: 0.00

Total Tax: 0.00

Credits Applied: 0.00

Payments Previously Applied: 0.00

Net total: 375.00

Net Applied: 0.00

Balance Due: 375.00

- The order has now been submitted and an invoice will be created on the specified Bill To organization's account.

Tips:

- View or print the invoice by clicking the **Print this page** button.
- The invoice will display under **My Open Invoices** in the **My Financial Transactions** (in the **My Account Links** section of the **Main Dashboard**) and will show who the invoice was billed to together with the name of the organization contact to receive the invoice.
- Click the **View Details** button to review the details on the invoice.



Tue 23/04/2019 4:07 PM

sccinfo@safetycodes.ab.ca

New Proforma Invoice #220014

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 #: 220014

Invoice Date: 4/23/2019 4:07:05 PM

Total: \$375.00

Payment Amount: \$

Balance: 375.00

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 220014 1.00	Course: 100166 Fire, Properties of Materials, AFC 2014	375.00	0.00	0.00	0.00	375.00	0.00	375.00
Jax Miles 220014 1.00	Materials (online): 100166 Fire, Properties of Materials, AFC 2014	0.00	0.00	0.00	0.00	0.00	0.00	0.00

- An email notification with the details of the order will be routed to the person specified on the **Organization Contact** field at check-out.

Receiving Updates on Invoice Status



Tue 23/04/2019 4:12 PM

sccinfo@safetycodes.ab.ca

New Payment #210172

To Cheryl Bozek

Safety Codes Council

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

Customer's Name: Ms. Cheryl The SCO

Date: 4/23/2019

Transaction Date: 4/23/2019 4:11:33 PM

Total: \$375.00
Payment Amount: \$375.00
Balance: 0.00

authorization:

Reference Number: 82925594517095743

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 220014 1.00	Course: 100166 Fire, Properties of Materials, AFC 2014	375.00	0.00	0.00	0.00	375.00	375.00	0.00

9. When the organization pays the invoice (or pays any of the line items on the invoice), an email confirmation of the payment details will be sent to the organization contact as well as to the purchaser.
10. Once Council receives payment of the invoice the associated transaction(s) will be processed and the order will be fulfilled.
 - a. If the invoice includes a course or exam registration event, a spot will be held in the event until the related line item on the invoice is either voided or paid in full. Registration will be confirmed and course and exam materials will be sent once full payment is received.

Council Connect Welcome, Mr. Miles Jax (Sign Out)

[My Account](#) [Courses/ Exams](#) [Learning Path](#) [Online Store](#) [Credential Search](#) [Help](#)

My Financial Transactions

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

My Open Invoices

Invoice	Date	Total	Paid	Due	Billed To	Contact
220012	04/23/2019	\$400.00	\$325.00	\$75.00	My First Agency	Ms. Cheryl The SCO

[View Details](#) [Add to Cart](#)

All Invoices

Invoice	Date	Total	Paid	Balance Due
220012	04/23/2019	\$400.00	\$325.00	\$75.00

[View Details](#)

Products

Invoice #	Tracking #	Product Name	Product Price	Returned Canceled	Date Paid
220012		Materials (online): 100116 Effective Writing Techniques for Fire SCOs	\$0.00	0	04/23/2019

My Open Credits

Credit Available	Required Product Type

11. If an invoice includes more than one line item or purchase for an organization to pay and if the organization pays only some of the line items, the email confirmation will show which item(s) were paid.
 - a. **My Financial Transactions** on both the organization's and the individual's dashboard will be updated to show clearly which item(s) were paid and which, if any, items remain to be paid on the same invoice.

Wed 24/04/2019 4:51 PM

sccinfo@safetycodes.ab.ca

Product Voided on Invoice 220020

To: milesjax@shaw.ca; Cheryl Bozek

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.

12. If the organization voids the invoice (or a line item on the invoice), an email will be sent, advising the individual to contact the organization for more information.
 - Tip:** If the voided line item is for a course or exam registration, the pending registration will be cancelled (a seat will not be held and the registration will need to be purchased again if still required).
13. If all line items are voided on an invoice, the invoice will no longer display on either the organization or the individual purchaser's **My Financial Transactions** page.
14. There are other tutorials for the other tasks (i.e. course or exam registrations, certification or accreditation submissions, purchasing items from the online store, and any other miscellaneous items) which reference this tutorial for the payment steps.