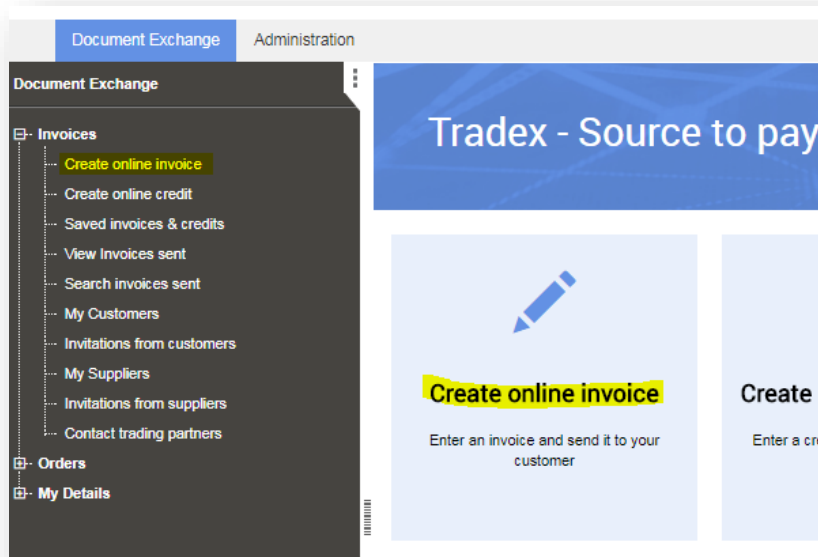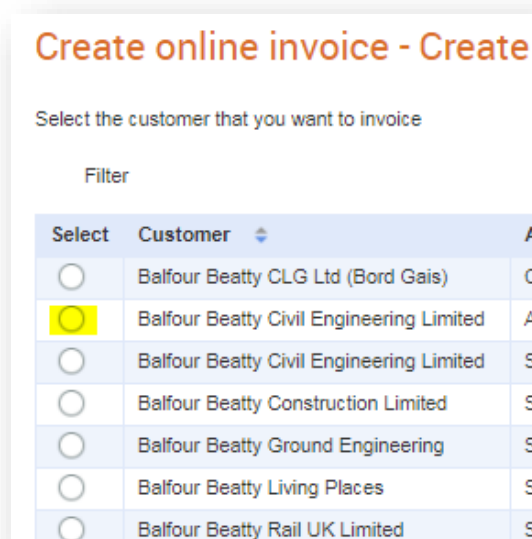# Creating a hire invoice on Tradex

Select 'Create online invoice' from either the menu down the left-hand side or by clicking the tile.

Select the Balfour Beatty customer you wish to invoice.

Balfour Beatty

Enter the invoice details at 'header level'

- Invoice number should be the invoice number on the actual invoice (do not submit consolidated invoices).

- Invoice date will default to today's date, update this to the invoice date on the actual invoice.

- Enter the Purchase Order number you were given.

- Leave the Payment Terms blank as this information is set up in your supplier record.

- Enter the delivery address that the goods/services relate to.

- In the Contract Number field, enter the Hire Contract Agreement number

  - *If you don't have a Hire Contract number, please enter the timesheet number for operated or the delivery reference for items on hire.*

- Complete Delivery note number, Contact name and Contact telephone fields, if you have the information to do so.

- Ensure you tick 'Is this a hire invoice?'

  - *If this isn't a hire invoice, please refer to the section below on 'Creating a material/service invoice on Tradex'.*
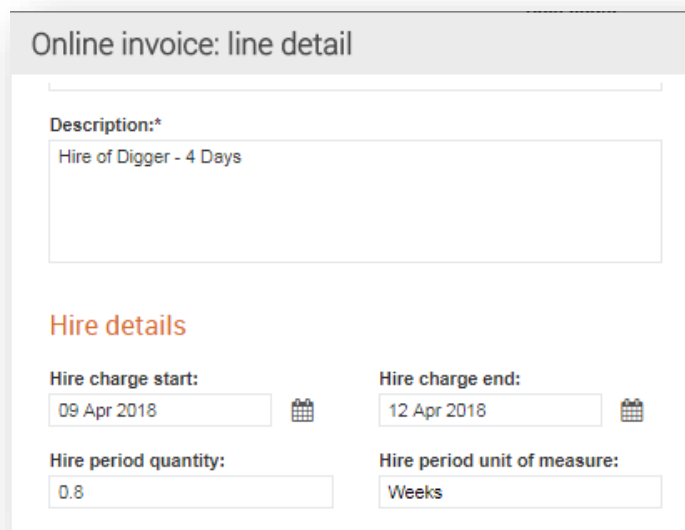
To:*	**Trading relationship:***
Balfour Beatty Civil Engineering Limited	SPEEDY_BBCEL
Invoice number:*	**PO number:**
INV12345	Enter Purchase Order Number Here
Sender's tax registration number:*	**Payment terms (days):**
1234569876	
Invoice date:*	**Delivery address:**
14 May 2018	Delivery Address Goods/Services-
Delivery date:	Relate to
Delivery note number:	
Delivery Note Number if have one	
Contract number:	
Hire Contract Agreement Number	
Contact name:	**Post code:**
Joe Blogs	
Contact telephone:	**Country:**
0191 123456	GB
☑ Is this a hire invoice?	**Currency code:**
	GBP
Notes:	
Add Any Additional Information Here	

- You can add any additional information that you feel we may require in the 'Notes' section.

- You are now ready to create the line details of the invoice.

- You will need to add a line for each line you have on an invoice.

- Scroll down the page and click 'Add Line' to create the first line.

Line details

Action	Line	Product ID	Qty	Rate
Add line	1			

- From this screen, you should enter the line details as per your invoice.
  - *The hire of a digger is being used as an example.*

Online invoice: line detail

Description:*

Hire of Digger - 4 Days

Hire details

Hire charge start:
09 Apr 2018

Hire charge end:
12 Apr 2018

Hire period quantity:
0.8

Hire period unit of measure:
Weeks

- Please ensure that you enter the hire period quantity and unit of measure correctly.
- **If the PO has been raised in weeks**, then the hire details should also be entered in weeks.
- **If the PO has been raised in days**, then the hire details should also be entered in days.
- If the unit of measure is w**eeks** enter the hire period quantity as follows – 1 day = 0.2, 2 days = 0.4, 3 days = 0.6, 4 days = 0.8, and **5 days = 1.0**
- If the unit of measure is **days** enter the hire period quantity as follows – 1 = 1 day, 2 = 2 days, 3 = 3 days etc.

Complete the additional details fields

- Enter the PO number if not already populated – This must be exactly the same as entered at header level.

Contract number field

- **Static** e.g. Crain, Digger enter the hire contact reference number – *if you don't have a hire contract reference number, enter the original delivery reference number.*
- **Operated** e.g. Driver/Operator enter the drivers' timesheet number

Enter the delivery date, PO line reference and delivery note number if known. If unsure, leave blank.

Additional details

PO number:

PO line reference:

Contract number:

Delivery note number:

Delivery date:

Complete the amounts section

- Quantity = number of diggers (1)

- Unit of measure = Hours / days / weeks

- Net unit price = net price of digger hire for the week

- Click calculate and this will work out the Net, VAT and Gross amount

- Click save

Amounts

Quantity:*
1

Net line amount:
160.00

Unit of measure:*
Weeks

VAT amount:
32.00

Net unit price:*
200

Total amount:
192.00

VAT:*
20% - Standard

Calculate   Adjust

Notes

Additional notes:

Cancel   Save

If you want to add a new line e.g. add an operator/driver
- Scroll down to line details and add a new line

- **Add description** as required
- Hire period quantity = number of hours
- Unit of measure = hours

Hire details
- For operated lines, leave this section blank

Complete the additional details fields
- Timesheet reference should be entered in contract number

Additional details

PO number:

PO line reference:

Contract number:

Timesheet Number

Delivery note number:

Delivery date:

Complete the amounts section

- Quantity = number of drivers
- Unit of measure = hours
- Net unit price = net price per hour
- Calculate

Amounts

Quantity:*

2

Net line amount:

140.00

Unit of measure:*

Hours

VAT amount:

28.00

Net unit price:*

10.00

Total amount:

168.00

VAT:*

20% - Standard

Calculate   Adjust

Notes

Additional notes:

Cancel   Save

- Save
- Add more lines if required and repeat the above steps.

- Once finished entering the line items, check the totals summary to ensure they match the invoice and tick 'I have confirmed the auto-calculated totals are correct'

- If you wish to **save** the information to come back and submit at a later time, click the 'Save' button. This will move the invoice to your 'Saved Invoices & Credits' section on Tradex – *Balfour Beatty will not receive the invoice.*

- If you are happy with the information and wish to **submit** it to Balfour Beatty for processing, click the 'Submit' button.

- The invoice will be sent to Balfour Beatty and it will not be possible to amend any of the information once this is done.