CHAPTER 1

Setting Up Billing

This chapter discusses how to:

- Set up billing messages.
- Set up invoice layouts.
- Set up invoice ID number generation.
- Set up billing scan lines.
- Set up billing types.
- Set up billing standard requests.

Setting Up Billing Messages

To set up billing messages, use the Message Categories component (BI_MSG_CAT_TBL), the Item Type Message component (BI_BILL_MSG_ITM), the Customer Message component (BI_BILL_MSG_CUS), the Business Unit Message component (BI_BILL_MSG_ALL), the Aging Set Messages component (BI_BILL_MSG_AGE), the Corporation Messages component (BI_BILL_MSG_ORG), and the Billing Messages component (BI_BILL_MSG_TBL).

This section provides an overview of billing messages and discusses how to:

- Define billing messages.
- Link billing messages to item types.
- Link billing messages to aging sets.
- Link billing messages to business units.
- Link billing messages to students.
- Link billing messages to organizations.

Understanding Billing Messages

You can create and organize the messages that appear on your bills by defining message categories and billing messages.

Message categories enable you to track and organize billing messages that relate to one type of action or account. You must link all your billing messages to a message category.

After you have defined message categories, you create the messages that appear on your bills. Your messages can alert students of past due payments, warn them of potential fines or penalties, or inform them how their bills are calculated.

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You link each message to an item type, an aging set, a business unit, a student, or a corporation. When you link the messages to these elements, the system determines which messages appear on each bill depending on to whom the bill is issued and to what the bill pertains.

Pages Used to Set Up Billing Messages

Page Name	Definition Name	Navigation	Usage
Message Categories	BI_MSG_CAT_TBL	Set Up SACR, Product Related, Student Financials, Billing, Message Categories	Define message categories.
Item Type Messages	BI_BILL_MSG_ITM	Set Up SACR, Product Related, Student Financials, Billing, Item Type Message	Link billing messages to item types.
Customer Messages	BI_BILL_MSG_CUS	Set Up SACR, Product Related, Student Financials, Billing, Customer Message	Link billing messages to students.
Business Unit Messages	BI_BILL_MSG_ALL	Set Up SACR, Product Related, Student Financials, Billing, Business Unit Message	Link billing messages to business units.
Aging Set Messages	BI_BILL_MSG_AGE	Set Up SACR, Product Related, Student Financials, Billing, Aging Set Messages	Link billing messages to aging sets.
Corporation Messages	BI_BILL_MSG_ORG	Set Up SACR, Product Related, Student Financials, Billing, Corporation Messages	Link billing messages to organizations.
Billing Messages	BI_BILL_MSG_TBL	Set Up SACR, Product Related, Student Financials, Billing, Billing Messages	Define billing messages.

Defining Billing Messages

Access the Billing Messages page (Set Up SACR, Product Related, Student Financials, Billing, Billing Messages).

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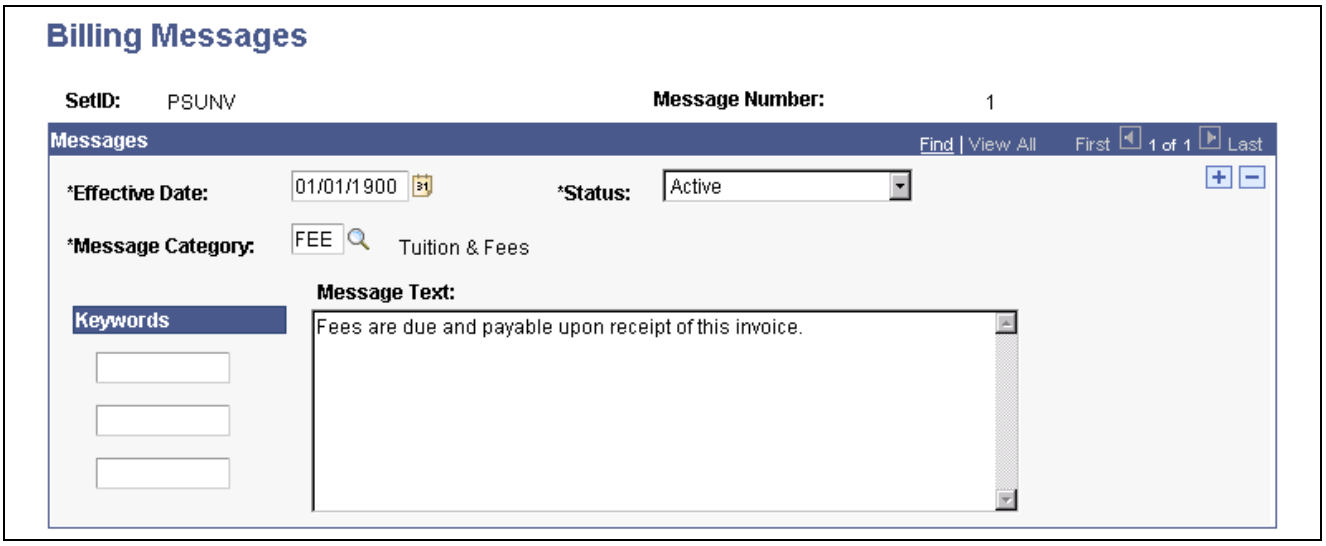

Billing Messages page

Message Category Select a category with which to associate this message.

Keywords Enter keywords to use when searching for this message.

Message Text Enter the message to print on the bill. Remember that you link billing messages to item types, aging sets, business units, students, and corporations. Make the text of the message specific to whichever one that you plan to link it to.

Linking Billing Messages to Item Types

Access the Item Type Messages page (Set Up SACR, Product Related, Student Financials, Billing, Item Type Message).

Message Number Select the number of the billing message to link to the item type range.

When you generate a bill with charges or payments associated with the specified item type, the message linked to that item type appears on the bill. For example, if you create a billing message explaining how you calculate tuition, you can attach this message to all the tuition item types. When the system generates a bill with a charge against a tuition item type, the message explaining how you calculate tuition appears on the bill.

Linking Billing Messages to Aging Sets

Access the Aging Set Messages page (Set Up SACR, Product Related, Student Financials, Billing, Aging Set Messages).

Message Number Select the number of the billing message to link to the aging set and aging category.

When you generate a bill for a customer whose payment is late, the system selects the message to appear on the bill based on the number of days the payment is past due.

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Note. You can attach only one message per aging category. The message associated with the oldest charge on a customer's account is the one that appears on the customer's bill.

Linking Billing Messages to Business Units

Access the Business Unit Messages page (Set Up SACR, Product Related, Student Financials, Billing, Business Unit Message).

Message Number Select the number of the billing message to link to the business unit.

Messages linked to a business unit appear on all bills generated by that business unit.

Linking Billing Messages to Students

Access the Customer Messages page (Set Up SACR, Product Related, Student Financials, Billing, Customer Message).

Message Number Select the number of the billing message to link to the student.

When you generate bills for the student, the billing messages you linked appear on the bill.

Linking Billing Messages to Corporations

Access the Corporation Messages page (Set Up SACR, Product Related, Student Financials, Billing, Corporation Messages).

Message Number Select the number of the billing message to link to the organization.

When you generate bills for the organization, the billing messages that you linked appear on the bill.

Setting Up Invoice Layouts

To set up invoice layouts, use the Invoice Layout component (BI_INV_LAYOUT).

An invoice layout is a set of parameters that determine how the system formats the invoices that you print. Because you may require different formats for different types of invoices, you can create many different invoice layouts.

This section discusses how to:

- Define and maintain reports.
- View sample XML for report definition.
- Print invoices from the run control page.
- Define invoice layout information.
- Define invoice layout sorting and summarization.

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Understanding XML Publisher

Institutions may use XML Publisher, 3C Engine, and Communication Generation to print a variety of communications or letters, for example, generated invoices. Schools which use global invoicing can use any of the three to print reminder letters. Additional setups are often required if an institution uses XML Publisher.

Student Financials provides four templates to print invoices. They illustrate how an institution may present invoice data to students and external organizations. The templates can be customized to accommodate specific requirements.

The following billing templates are provided:

- *Template SSF_INVOICE_O1* can be used for standard External Organization Invoicing
- *Template SSF_INVOICE_OE1* can be used for Global External Organization Invoicing and includes logic for Credit Invoicing.
- *Template SSF_INVOICE_S1* can be used for standard Student Invoicing.
- *Template SSF_INVOICE_SE1* can be used for Global Student Invoicing and includes logic for Credit Invoicing.
- *Template SSF_INVOICE_TPC* can be used for standard External Organization Invoicing and includes logic for showing student enrollment details.

Templates are designed to work with existing Invoice options as defined on the Invoice Layout setup page where you can associate XML Pub Reports and templates to specific Invoice Layouts.

Pages Used to Set Up Invoice Layouts

Page Name	Definition Name	Navigation	Usage
Report Definition	SSF_PRNT_INV	Reporting Tools, XML Publisher. Setup, Report Definition, Definition	Define and maintain reports.
Data Source	PSXPDATASRC	Reporting Tools, XML Publisher, Data Source	View sample XML for report definition.
Student Invoice Other	RUN_CNTL_PBILL	Student Financials, Bill Customers, Student Bills, Print Invoice	Print invoices from the run control page.
Invoice Layout One	BI_INV_LAYOUT	Set Up SACR, Product Related, Student Financials, Billing, Invoice Layout, Invoice Layout One	Define invoice layout information.
Invoice Layout Two	BI_INV_LAYOUT2	Set Up SACR, Product Related, Student Financials, Billing, Invoice Layout, Invoice Layout Two	Define invoice layout sorting and summarization.

Defining and Maintaining Reports

Access the Report Definition page (Reporting Tools, XML Publisher. Setup, Report Definition, Definition).

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Definition | Template | Output | Security | Bursting

Report Name: SSF_PRNT_INV

Data Source

Data Source Type: Rowset

Data Source ID: SSF_INVOICE_DEMO1

Data Source Description: SSF Invoice for XMLPublisher

Report Properties

Report Description: Print Invoices

*Report Status: Active

*Report Category ID: ALLUSER All PeopleSoft User

Object Owner ID: Student Financials

Template Type: PDF RTF eText XSL

Days Before Purge: 1

Registered Date/Time: 01/28/2006 3:45:49PM Registered By: PS

Updated Date/Time: 10/03/2006 10:58:34AM Updated By: PS

Download: Data Schema Sample Data

Report Definition page

Use the XML Publisher Report Definition page to define and maintain reports. The Student Financials templates reside under the XML Publisher report definition SSF_PRNT_INV.

View Sample XML For Report Definition

Access the Data Source page (Reporting Tools, XML Publisher, Data Source).

Data Source

Data Source Type: Rowset

Data Source ID: SSF_INVOICE_DEMO1

Data Source Properties

Description: SSF Invoice for XMLPublisher ☑ Active

Object Owner ID: Student Financials

Registered Date/Time: 01/25/06 9:40:45AM Registered By: PS

Last Update Date/Time: 09/27/06 8:05:55AM Updated By: PPLSOFT

Related Files

File Type	File	Upload File
Sample Data File	SSF_PRINT_INV.xml	Upload
Schema File	SSF_PRINT_INV.xsd	Upload

Data Source page

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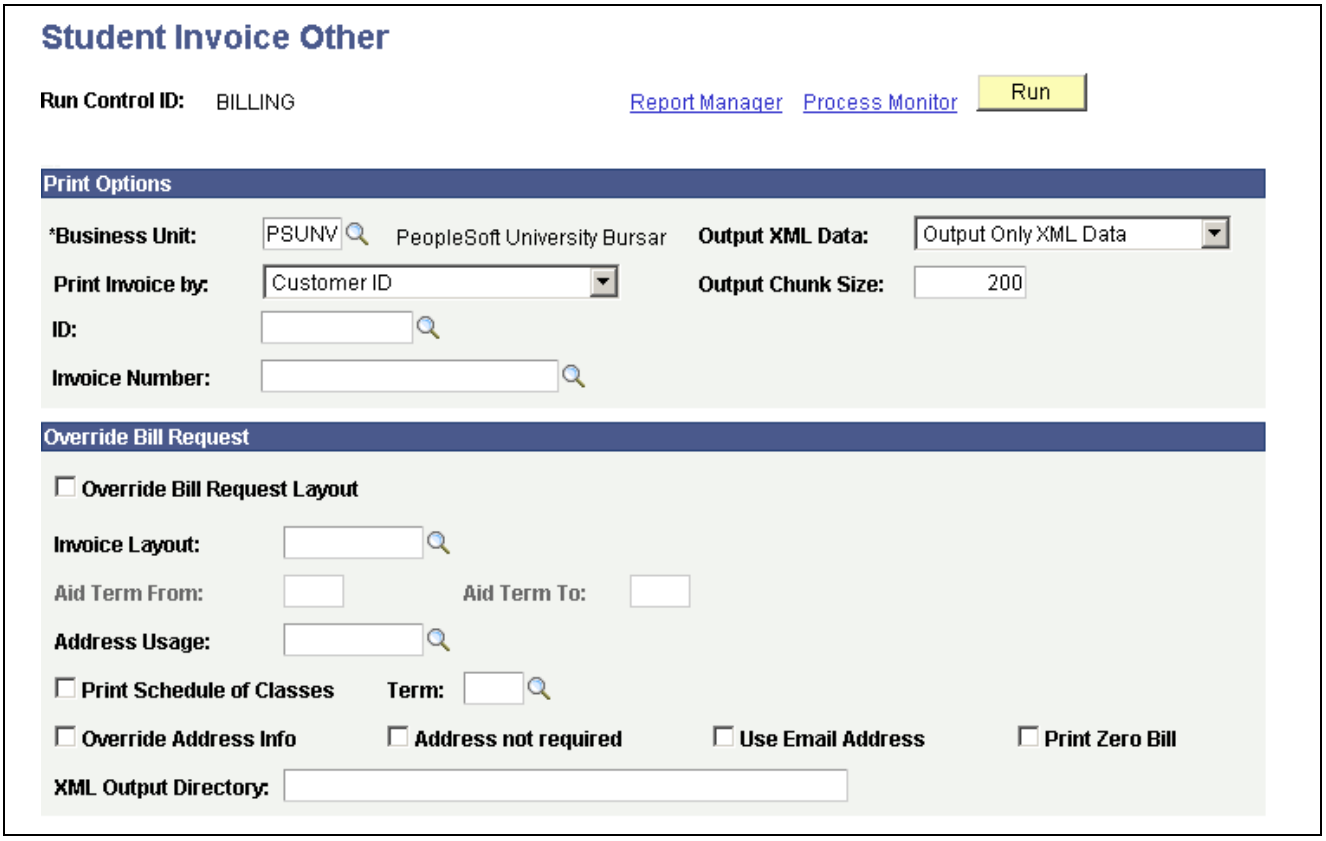
Use the Data Source page to view sample XML for your report definition. This enables you to review the data contained in the extract in detail. Use the data source ID from the Report Definition page.

Print Invoices From The Run Control Page

Access the Student Invoice Other page (Student Financials, Bill Customers, Student Bills, Print Invoice, Student Invoice Other).



Student Invoice Other page

XML can also be generated when printing invoices from the run control page by setting Output XML Data to either *Yes* or *Only Output XML Data*. The second option does not produce an invoice but does produce the related XML data, which is helpful when making modifications to the provided templates.

Note. The XML Output Directory should be populated with the target directory location. The process automatically generates a file name for the XML.

Output XML Data

Select *No* to create no XML output.

Select *Yes* to generate invoices and XML output.

Select *Output Only XML Data*to generate output XML data without invoices.

Output Chunk Size

Use this field to determine the size of the data chunks passed to XML Publisher. If it is set to zero, no chunking occurs.

Chunking determines how many invoices are in one file. For example, if you set Output Chunk Size to 200, 200 invoices are placed in each file output. In this example if you process 1,000 invoices and set Output Chunk Size to 200, five PDF files are produced, each containing 200 invoices.

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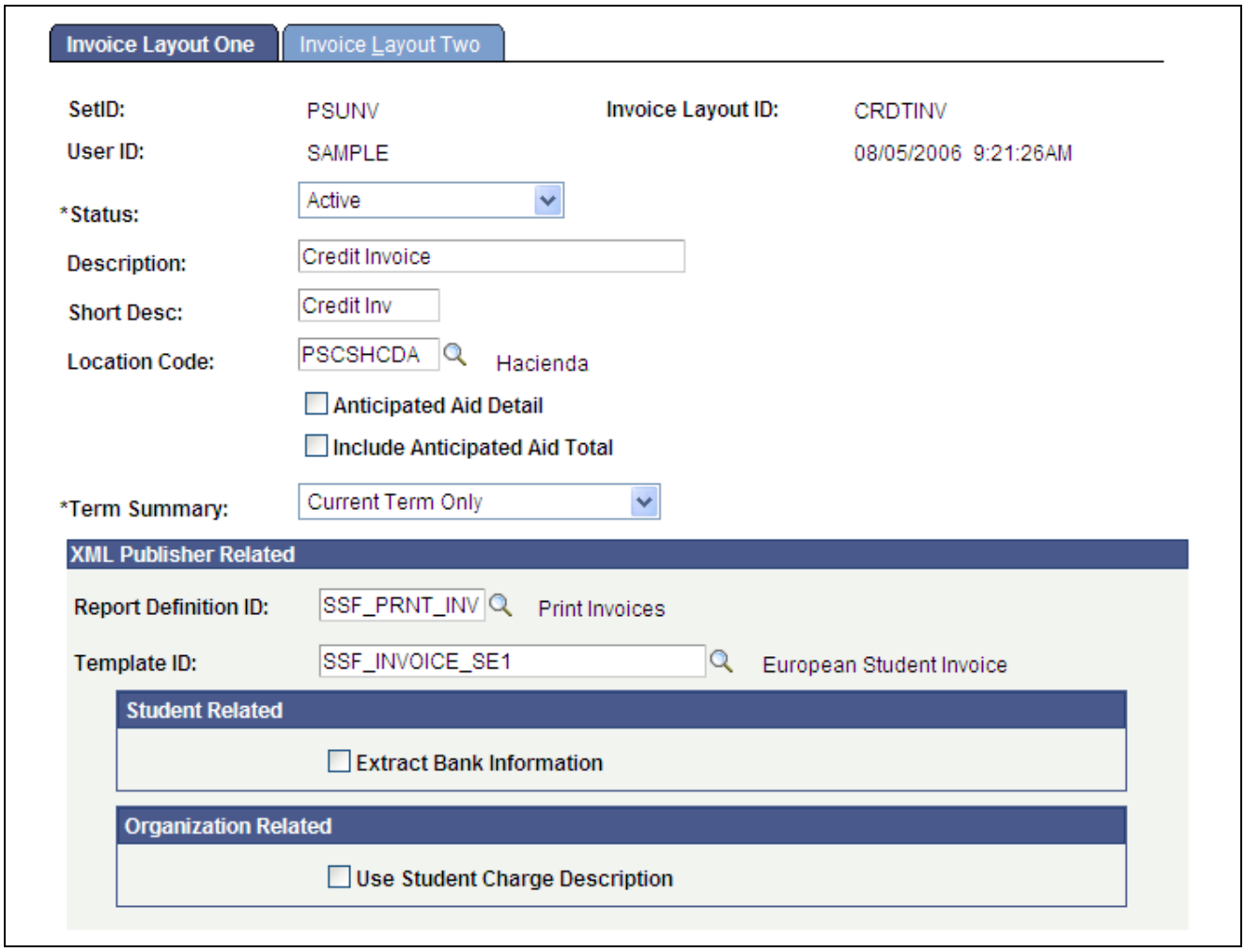
You can output directly to the printer and not create any files. In this case, chunking only controls the size of the chunks of data that are passed to XML Publisher. Chunking should still be used even if you output directly to the printer.

XML Output Directory Enter the directory path for the XML output. This field is not available when you select not to output XML data.

Defining Invoice Layout Information

Access the Invoice Layout One page (Set Up SACR, Product Related, Student Financials, Billing, Invoice Layout, Invoice Layout One).



Invoice Layout One page

Location Code Enter the location where invoice recipients must mail their payments.

Anticipated Aid Detail and **Include Anticipated Aid Total** Select to print, on the invoice, a detailed summary and the total amount of the financial aid that you expect the student to receive. If you do not select either of these options, no anticipated financial aid information appears on the invoice.

Term Summary Select the terms for which information appears in the term summary section of the invoice:

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All Terms: Displays information for past, current, and future terms.

Current and Future Only: Displays information regarding only current and future terms.

Current Term Only: Displays information regarding the current term only.

Future Only: Displays information regarding future terms only.

XML Publisher Related

Complete this section only if you are using XML Publisher

Report Definition ID Enter the desired report definition ID.

Template ID Enter the desired template ID.

Student Related

Extract Bank Information Select this check box if the student's banking information should be included in the XML Publisher extract.

Bundle 30. Added note about student-only NLD bank information

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Note. The extracted bank information is for NLD global invoicing (student only) and comes from the SSF_STDNT_BNK_NLD table. This is *not* the generic bank information that was set up in the Bank Accounts – Student component and stored in the SSF_BANK_ACCT table.

See PeopleSoft Student Financials 9.0 PeopleBook, Setting Up and Managing Bank Accounts

Organization Related

Use Student Charge Description This check box is applicable only to Corporation Bills. Select this check box if the charge description from the student charge item on Student Account should be displayed on the corporate invoice. If the check box is cleared, the charge description of the charge item type from Corporate Account is displayed on the corporate invoice.

See [PeopleSoft Enterprise Student Financials 9.0 PeopleBook]Billing Customers.

Defining Invoice Layout Sorting and Summarization

Access the Invoice Layout Two page (Set Up SACR, Product Related, Student Financials, Billing, Invoice Layout, Invoice Layout Two).

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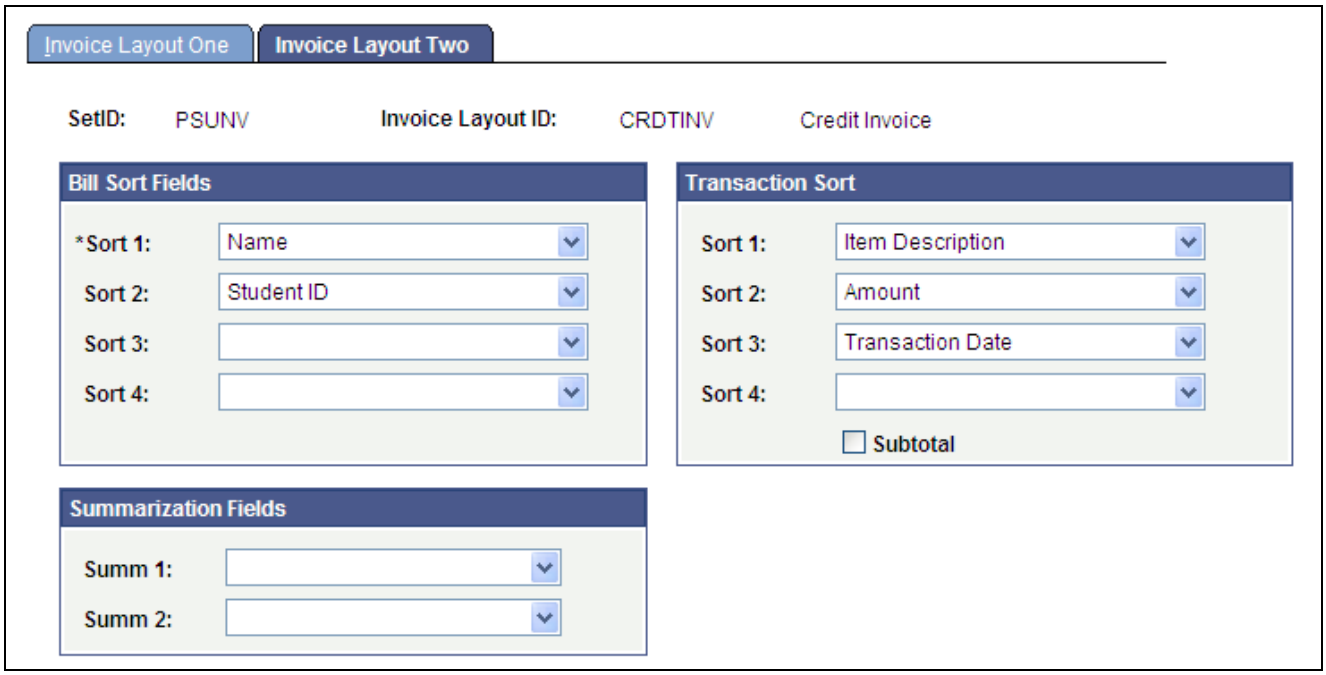

Invoice Layout Two page

Bill Sort Fields

Determine the sort order of the invoices in a given billing run. The sort order that you choose here determines the order in which the system prints the invoices. You do not have to enter a value in all four sort fields. In the preceding example, invoices are sorted first by postal code, then by student ID.

Sort 1, Sort 2, Sort 3, and **Sort 4**

Select the sort order of your invoices:

Academic Level: Sorts by the academic level of the student (such as freshman, sophomore, junior, or senior).

Academic Load: Sorts by the academic course load of the student (such as part-time or full-time load).

Academic Program: Sorts by the academic program of the student (such as liberal arts).

Campus: Sorts by the campus of the institution that the student attends.

Corporation ID: Sorts by the unique ID (organization ID) of the external corporation associated with each bill.

Country: Sorts by the country of residence of the student associated with each bill.

Invoice Number: Sorts by the system-generated invoice number assigned to each bill.

Name: Sorts by the name of the student associated with each bill.

Student Enrollment Block: Sorts by the Enrollment Block associated to the ID.

ID: Sorts by the unique ID of the student associated with each bill.

Total Amount Due: Sorts by the total dollar amount due for each bill.

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Tuition Residency: Sorts by the tuition residency of the student (for example, in-state or out-of-state tuition) in effect at the time that the system generates the bill.

Zip Code: Sorts by the postal code of the student associated with each bill.

Note. You cannot sort by both invoice number and ID. The system will not give you an error message

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Transaction Sort

Determine how transaction details are sorted on an individual invoice. You do not have to enter a value in all four sort fields.

Sort 1, Sort 2, Sort 3, and **Sort 4**

Select how to sort transaction details on your invoices:

Academic Year: Sorts by the academic year associated with each transaction.

Account Number: Sorts by the account number of each transaction.

Amount: Sorts by the dollar amount of each transaction.

Due Date: Sorts by the due date of each transaction.

Item Description: Sorts by the description of the item type for each transaction.

Item Number All: Sorts by the item number that the system assigns to each transaction during posting.

Session: Sorts by the academic session associated with each transaction.

Student ID (Third Party): Sorts a sponsoring organization's bills by the unique student ID associated with each third-party transaction.

Student Name (Third Party): Sorts a sponsoring organization's bills by the student name associated with each third-party transaction.

Term: Sorts by the academic term associated with each transaction.

Transaction Date: Sorts by the date on which each transaction occurred.

Subtotal

Becomes available if you enter a value in the Sort 1 field. Select to print a subtotal of the transactions on the invoice.

Summarization Fields

You can summarize billing information on your printed invoices rather than printing all the billing details. Use this group box to select the fields by which you want to summarize. When you summarize, the printed invoice no longer shows transaction detail.

Summ 1 (summary 1) and **Summ 2** (summary 2)

Select how to summarize billing information on your printed invoices:

Account Number: Summarizes by the account number and account term.

Item Description: Summarizes by the item type description.

Item Nbr - Refund/Payment Only (item number - refund/payment only): Summarizes refunds and payments by item number only. Transaction details for other transactions still appear according to the sort order selected in the Transaction Sort Fields group box.

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Item Number All: Summarizes by the item number that the system assigns to each transaction during posting.

Item Type Code: Summarizes by the item type code or classification.

Item Type: Summarizes by item type.

Student ID (Third Party): Summarizes a sponsoring organization's bills by the unique student ID associated with each third-party transaction.

Student Name (Third Party): Summarizes a sponsoring organization's bills by the student name associated with each third-party transaction.

Setting Up Invoice ID Number Generation

To set up invoice ID number generation, use the Invoice ID Number component (INVOICE_NUMBER).

Each bill that you create must have a unique invoice ID number associated with it. You define how the system generates each invoice ID number. The invoice number consists of three parts that combine text with system-generated number sequences. Each part can consist of no more than 10 characters and no fewer than 2 characters. The maximum length of the entire invoice ID is 22 characters. This section discusses how to define invoice number generation.

Page Used to Set Up Invoice ID Number Generation

Page Name	Definition Name	Navigation	Usage
Invoice ID Number	BI_IVC_NUM	Set Up SACR, Product Related, Student Financials, Billing, Invoice ID Number	Define invoice number generation.

Defining Invoice Number Generation

Access the Invoice ID Number page (Set Up SACR, Product Related, Student Financials, Billing, Invoice ID Number)

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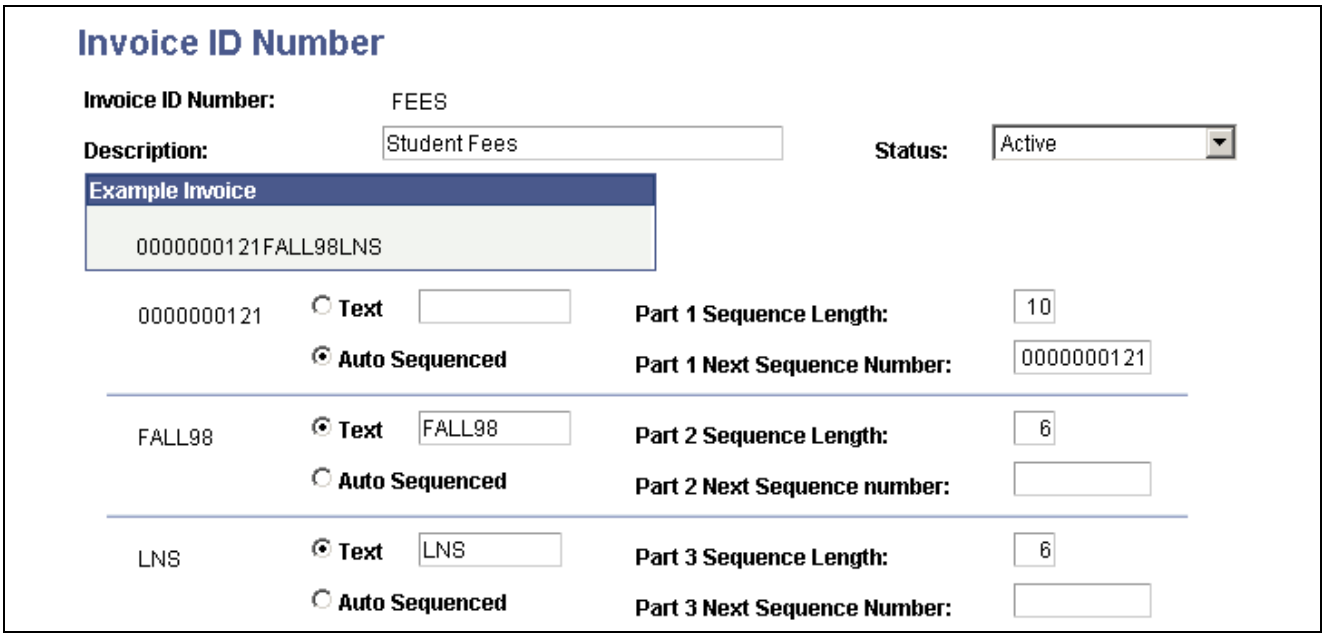

Invoice ID Number page

Example Invoice Displays how your invoice IDs appear using the parameters that you select.

Text Select to enter specific text for the segment. The Part 1 Sequence Length, Part 2 Sequence Length, or Part 3 Sequence Length field of the segment becomes available, depending on which segment you are defining.

Auto Sequenced Select to make the segment a number automatically sequenced by the system. The Part 1 Next Sequence Number, Part 2 Next Sequence Number, or Part 3 Next Sequence Number field becomes available, depending on which segment that you are defining.

Part 1 Sequence Length, Part 2 Sequence Length, and **Part 3 Sequence Length** If you selected the Text option for a segment, enter characters to appear on the bill along with the length of the segment. If the length is greater than the number of characters that you enter, the system puts a number of spaces in the segment equal to the difference between the length and the number of characters entered.

Part 1 Next Sequence Number, Part 2 Next Sequence Number, and **Part 3 Next Sequence Number** If you selected the Auto Sequenced option for a segment, use these fields to set the next number to appear on a bill. When you press TAB to move out of the field, the system fills the remainder of the field with zeros so that the total length is 10. This number appears in the segment of the first ID generated by the system using this invoice ID generation scheme. The auto-sequenced segment of each ID generated after the first is one higher than the previous. For example, if you enter *0000001* in the Part 1 Next Sequence Number field, the first segment of the first invoice ID is *0000001*. The first segment of the second invoice ID is *0000002*, and so on.

Setting Up Billing Scan Lines

To set up billings scan lines, use the Billing Scan Line component (BI_SCAN_LINE).

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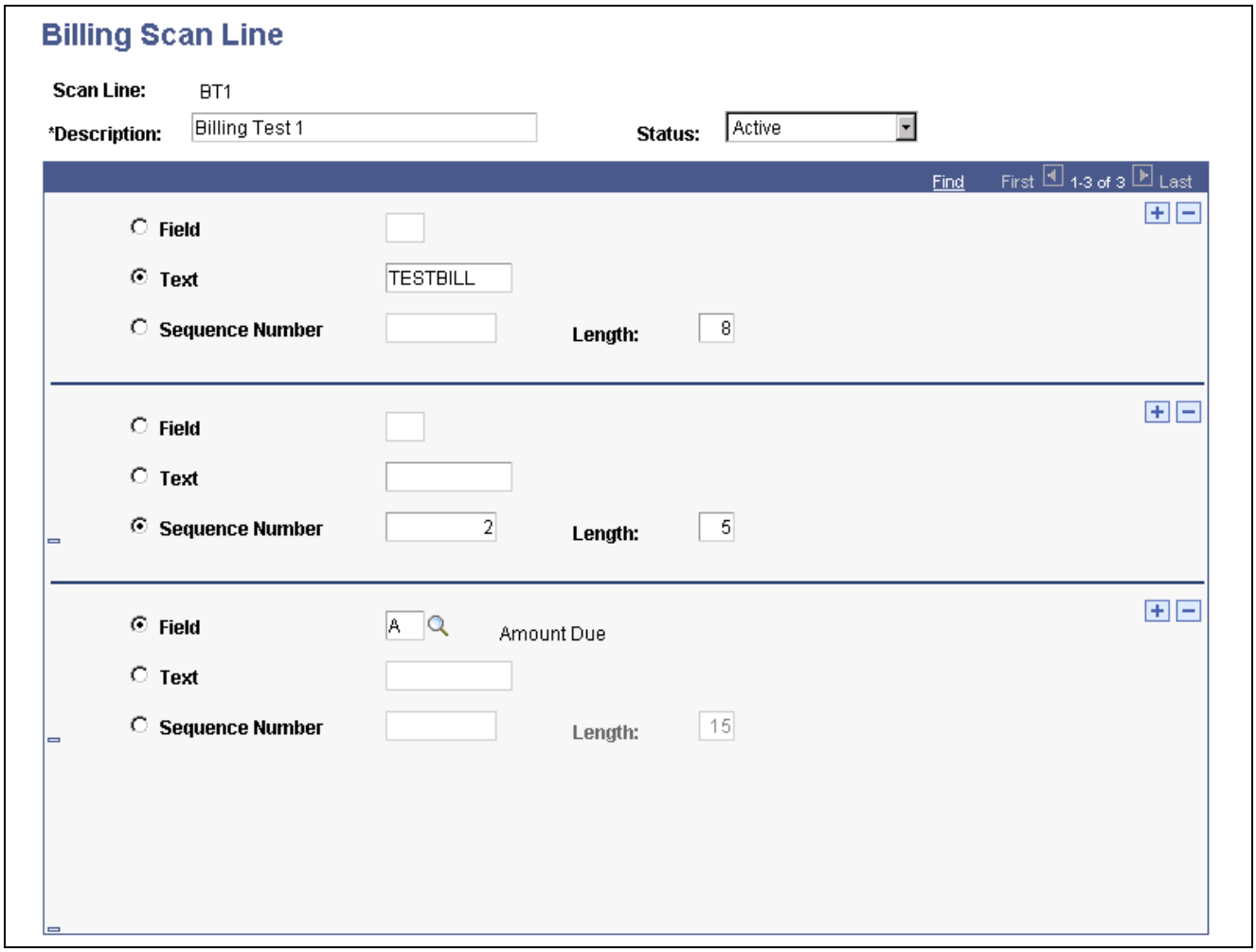
Create a bill scan line if your bank requires it to track transactions. Communicate with your bank to obtain specifications on how to construct your bill scan line. This section discusses how to define bill scan lines.

Page Used to Set Up Bill Scan Lines

Page Name	Definition Name	Navigation	Usage
Billing Scan Line	BI_SCAN_LINE	Set Up SACR, Product Related, Student Financials, Billing, Billing Scan Line	Define bill scan lines.

Defining Billing Scan Lines

Access the Billing Scan Line page (Set Up SACR, Product Related, Student Financials, Billing, Billing Scan Line).



Billing Scan Line page

The bill scan line is a single line of no more than 60 characters of both text and numbers. You add it to a bill using the General Selections 2 page of the Billing Standard Request component. Each segment consists of a field, a piece of text, or a sequence number.

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Field If you select the Field option, select the field that you want to use: *A* (amount due), *B* (business unit), *D* (invoice due date), *E* (employee ID), *I* (invoice date), *N* (invoice number), *O* (external org field), and *P* (postal code).

Text If you select the Text option, use the adjacent field to enter text to include in the bill scan line.

Sequence Number If you select the Sequence Number option, enter the number in the adjacent field. This number appears in the segment of the first bill scan line generated by the system using this bill scan line generation scheme. The automatically-sequenced segment of each bill scan line generated after the first is one higher than the previous. For example, if you enter *0000001*, the Sequence Number segment of the first bill scan line is *0000001*. The segment of the second bill scan line is *0000002*, and so on.

Length If you select the Field option, the system automatically populates the Length field according to the option that you choose. This field is then unavailable for editing.

If you select the Text option, the system automatically populates the Length field with the number of characters that you entered in the Text field. You can override this number with a greater number.

If you select the Sequence Number option, the system automatically populates the Length field with the number *10*. You can override this number.

Setting Up Billing Types

To set up billing types, use the Billing Type component (BI_TYPE_TBL).

When you set up your billing standard request, the system requires that you select a billing type for the request. The system uses billing types to distinguish bills when determining prior invoice amount and the last billing date for students or corporations. This section lists the page used to define billing types.

Page Used to Define Billing Types

Page Name	Definition Name	Navigation	Usage
Billing Type	BI_TYPE_TBL	Set Up SACR, Product Related, Student Financials, Billing, Billing Type	Define billing types.

Setting Up Billing Standard Requests

To set up billing standard requests, use the Billing Standard Request component (BI_STD_REQ_TBL).

This section discusses how to:

- Define general selections.
- Define additional general selections.

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- Define communication information.
- Define academic selections.
- Define additional academic selections.
- Select billing messages.
- Select student groups.
- Select enrollment blocks.
- Select account types.
- Define corporate information.

A billing standard request is a set of parameters that determine how the system identifies and bills groups of customers. After you set these parameters, you can use them repeatedly.

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Pages Used to Set Up Billing Standard Requests

Page Name	Definition Name	Navigation	Usage
General Selections	BI_STD_REQ_TBL	Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, General Selections	Define general selections.
General Selection 2	BI_STD_REQ_ALL6	Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, General Selection 2	Define additional general selections.
Communication Info (communication information)	BI_STD_REQ_ALL4	Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Communication Info	Define communication information.
Academic Selections	BI_STD_REQ_ALL1	Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Academic Selections	Define academic selections.
Academic Selections 2	BI_CAN_REQ_ALL1A	Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Academic Selections 2	Define additional academic selections.
Billing Standard Request - Messages	BI_STD_REQ_ALL2	Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Messages	Select billing messages.
Student Groups	BI_STD_REQ_ALL7	Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Student Groups	Select student groups.
Enrollment Blocks	SSF_STD_REQ_ERLBLK	Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Enrollment Blocks	Select enrollment blocks.
Account Selections	BI_STD_REQ_ALL3	Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Account Selections	Select the account types.
Corporation Info (corporation information)	BI_STD_REQ_ALL5	Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Corporation Info	Define corporate information.

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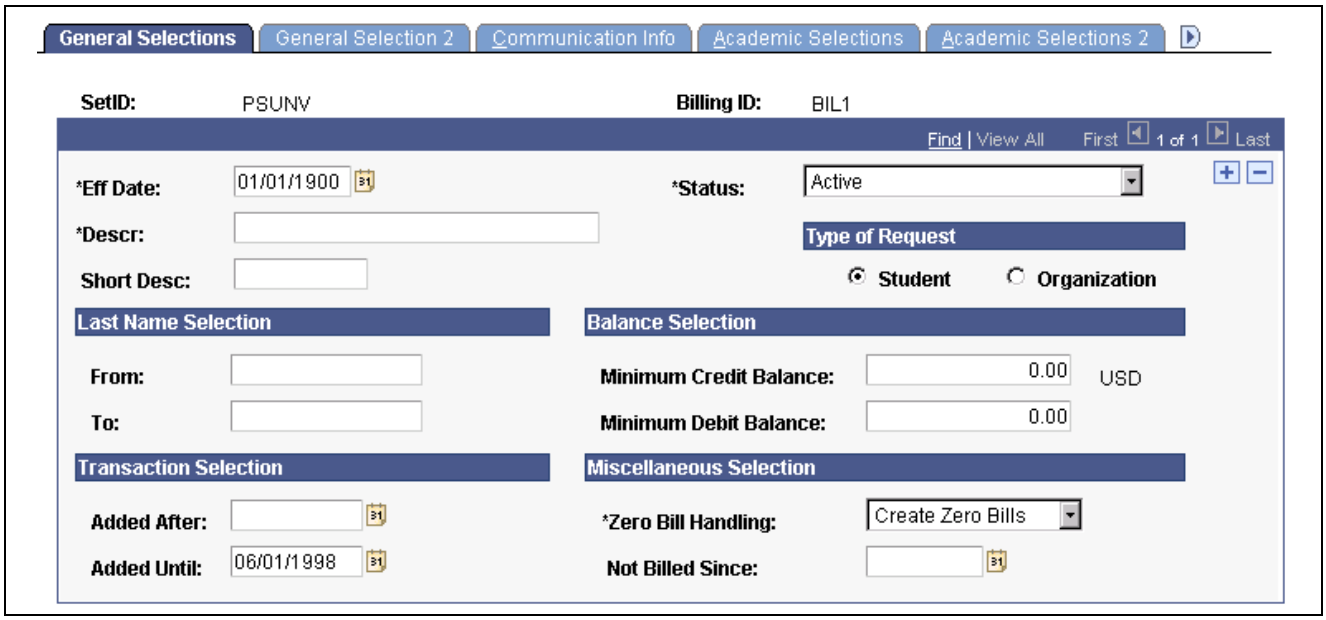
Defining General Selections

Access the General Selections page (Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, General Selections).



General Selections page

Type of Request

Student Select to create billing requests for students and individual customers. All fields on the page become available.

Organization Select to create billing requests for external organizations. The fields in the Last Name Selection group box become unavailable. You must use the Last Name Selection group box on the Corporation Info page instead.

Last Name Selection

From and **To** Define a range of students for which the system generates bills based on the students' last names. For example, to generate a bill for all students with last names starting with the letter *A* through the letter *C*, enter *A* in the From field and *C* in the To field. Leave these fields blank to generate bills for all students who meet the criteria that you set in this component.

Balance Selection

The two fields in this group box work together to generate bills for customers based on credit and debit balances.

Minimum Credit Balance Enter the credit balance above which you generate a bill. Enter the minimum credit balance as a negative number.

Minimum Debit Balance Enter the debit balance above which you generate a bill. Enter the minimum debit balance as a positive number.

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To create a bill for all students regardless of account balances, leave the Minimum Credit Balance and Minimum Debit Balance fields set to *0.00*.

Transaction Selection

Added After and **Added Until**

Filter the charges and payments included in the bill based on the date they posted. Only charges and payments posted after the date entered in the Added After field are included in the bill. Only charges and payments posted before or on the date entered in the Added Until field are included in the bill. To include all charges and payments, leave these fields blank.

Miscellaneous Selection

To bill all customers, leave all fields and options in this group box empty.

Select Billing by Invoice

Select this to indicate Select Billing by Invoice. This is only displayed when the institution has indicated Apply Payments by Invoice on the SF Installation setup.

Zero Bill Handling

Specify how the system processes bills for zero amounts:

Ignore Zero Bills: Ignores zero amounts. Be careful when using this value. The system looks for a net amount due and does not process bills when a credit balance in one account offsets a balance due in another account.

Create Zero Bills: Generates bills for zero amounts.

Update Zero Bills: Sets flags indicating that the account has been billed, but does not generate a bill. The next time that you run the billing process, the system ignores flagged zero amounts, thereby increasing performance.

Not Billed Since

Enter a date here to bill only those customers who you have not billed since that date. For example, if the date in the Not Billed Since field is *10/1/2005*, and you run the billing process on 10/15/2005, the system generates bills for students who it billed before 10/1/2005 or who it has not billed at all. The system does not bill students who it billed on 10/1/2005 or between 10/1/2005 and 10/15/2005.

If you select a value in this field, it overrides any conflicting selection criteria that you define.

Define Additional General Selections

Access the General Selection 2 page (Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, General Selection 2).

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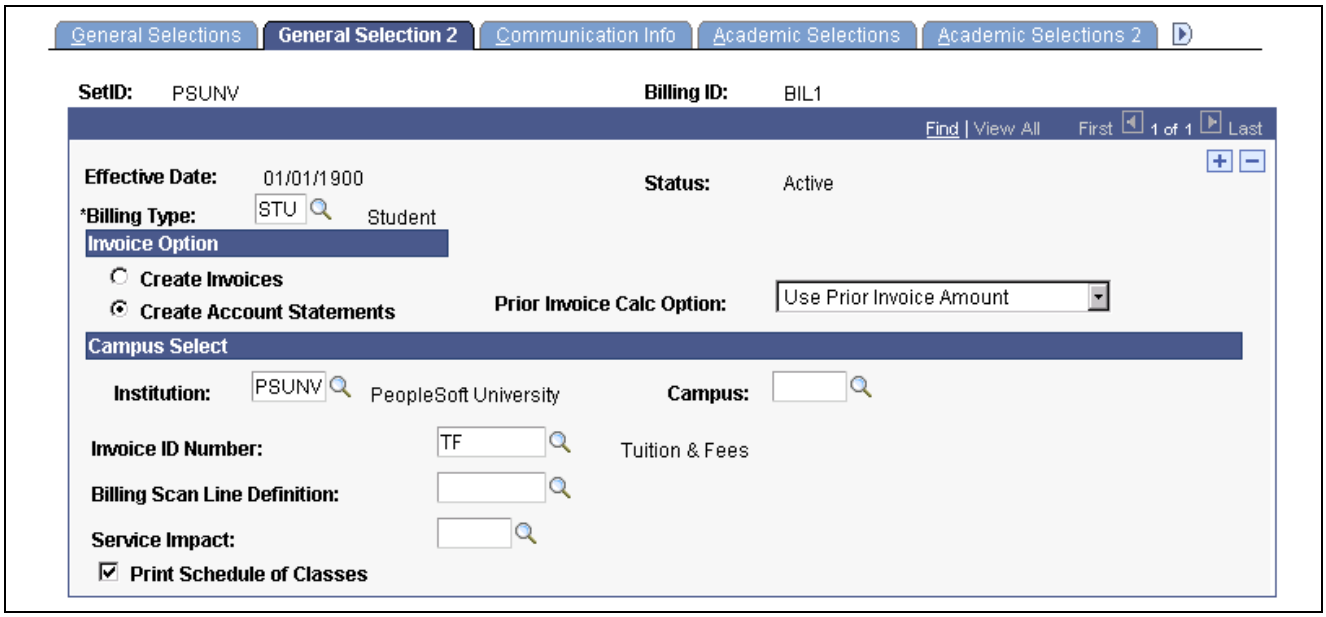

General Selection 2 page

Invoice Option

Create Invoices

Select so that your invoices do not reference the amount of the previous invoice. For example, suppose that you bill a student for tuition charges of 500.00 USD and housing charges of 2,000.00 USD, for a total of 2,500.00 USD on 10/1/2005. On 10/15/2005, a 75.00 USD miscellaneous charge posts to the student's account before the original bill is paid. If you generate another bill on 10/15/2005, it lists only the new invoice amount of 75.00 USD and details only the miscellaneous charge.

When selected, the system generates bills for accounts with new activity only.

Create Account Statements

Select to generate account statements rather than invoices. The details that appear on the account statement depend on the value that you select in the Prior Invoice Calc Option (prior invoice calculation option) field, which is available only if you select the Create Account Statements option.

When selected, the system generates bills even for accounts with no new activity. However, the system does not allow you to generate a bill more than once per day for an account with no new activity.

Note. Create Credit Invoices

If your institution selected Apply Payments by Invoice on the SF Installation 2 page of the SF Installation component, Create Credit Invoices will display in the Invoice Option group box in place of Create Account Statements.

Select Create Credit Invoices to create a credit invoice based on charge reversals.

Prior Invoice Calc Option (prior invoice calculation option)

Determine the details to appear on account statements:

Use Previous Invoice Amount: Account statements reference the amount of the previous invoice and indicate the previous invoice ID on new bills. For example, suppose that you bill a student for tuition charges of 500.00

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USD and housing charges of 2,000.00 USD, for a total of 2,500.00 USD on 10/1/2005. On 10/15/2005, a 75.00 USD miscellaneous charge posts to the student's account before the original bill is paid. If you generate another bill on 10/15/2005, it lists a prior invoice amount of 2,500.00 USD and the corresponding invoice ID, along with the new invoice amount of 75.00 USD that details only the miscellaneous charge.

Account Balance Method: Account statements reference the amount of the previous invoice but do not indicate the previous invoice ID on new bills. For example, suppose that you bill a student for tuition charges of 500.00 USD and housing charges of 2,000.00 USD, for a total of 2,500.00 USD on 10/1/2005. On 10/15/2005, a 75.00 USD miscellaneous charge posts to the student's account before the original bill is paid. If you generate another bill on 10/15/2005, it lists a prior invoice amount of 2,500.00 USD, along with the new invoice amount of 75.00 USD that details only the miscellaneous charge.

Campus Select

Institution Select an institution. The system generates bills for students who attend the selected institution only.

Campus Select a campus. The system generates bills for those students on the selected campus only. You must select an institution before you select a campus.

Remaining Fields

Invoice ID Number Select the user-defined invoice ID number generation scheme that you want to use to assign unique invoice ID numbers to each bill.

Bill Scan Line Definition If your bank requires bill scan lines, select the bill scan line generation scheme that you want to use to attach a bill scan line to each bill.

Service Impact (Optional) Attach a service impact to the billing standard request. You normally use this field to attach a service impact that excludes from billing those students or corporations with a service indicator associated with the selected service impact.

Print Schedule of Classes Select to print the student's enrollment summary on your invoices. This field is not available if you select the Corporation option in the Type of Request group box on the General Selections page.

Defining Communication Information

Access the Communication Info page (Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Communication Info).

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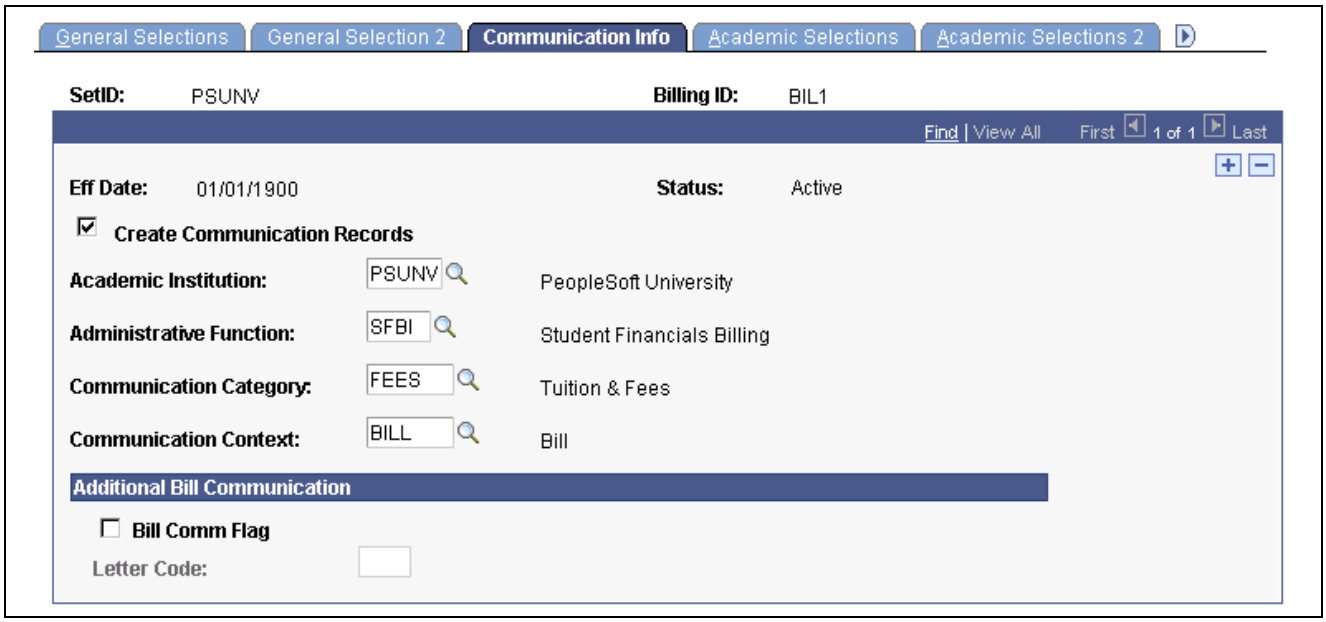

Communication Info page

Create Communication Records	Select to create a communication record during the bill generation process.
Academic Institution	Enter the academic institution to which the communication record applies.
Administrative Function	Enter *SFBI.*
Communication Category	Enter the type of communication record to create.
Communication Context	Within the communication category that you select, choose the context of the communication record to create.

Additional Bill Communication

Bill Comm Flag (bill communication flag)	Select to produce a duplicate bill for the parent or guardian of each student affected by the billing standard request when you run the billing process. The system uses the parent or guardian that you specify on the Relationships page within PeopleSoft Campus Community. The Letter Code field becomes available.
Letter Code	If applicable, enter one or more letter codes. The system matches these against any letter codes specified for the communication recipient on the Relationships page within Campus Community.

See Also

lscc, Setting Up Administrative Functions

lscc, Managing Communications

lscc, Managing Biographical Information, Managing Relationships Data

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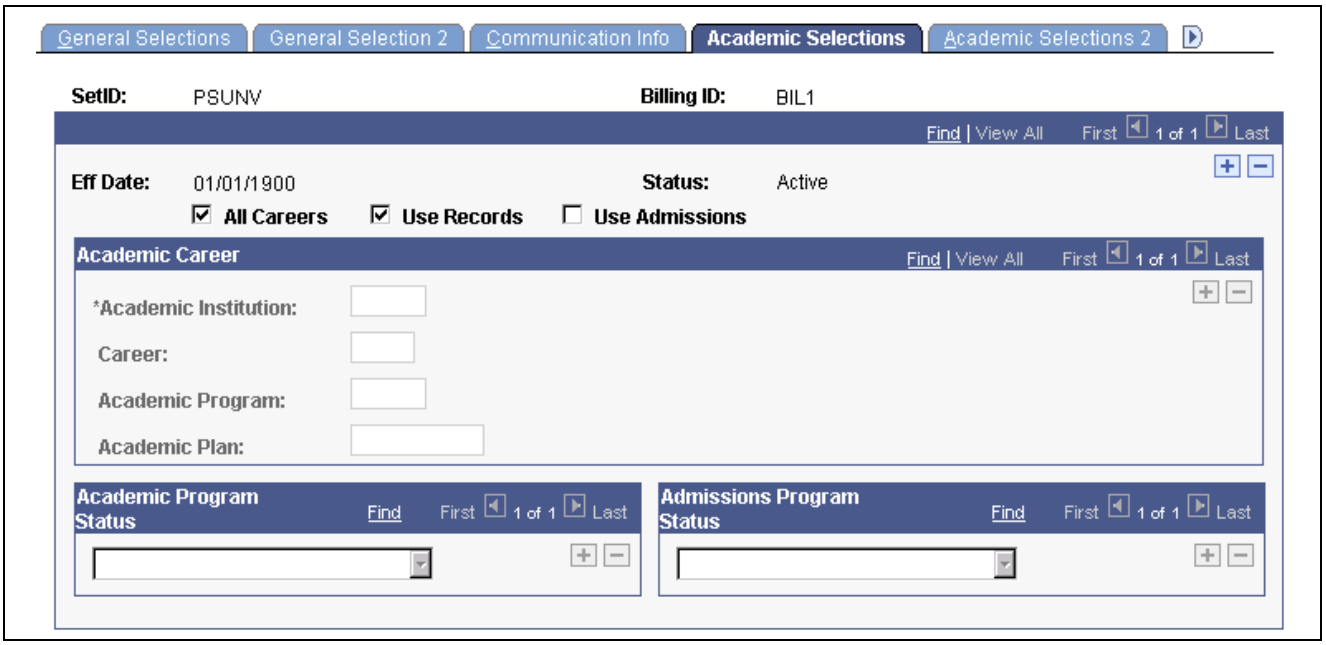
Defining Academic Selections

Access the Academic Selections page (Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Academic Selections).



Academic Selections page

All Careers Select to generate a bill for all students regardless of academic career. The Academic Institution, Career, Academic Program, Academic Plan, Academic Program Status, and Admissions Program Status fields become unavailable.

Use Records Select to filter billed students based on academic program status. The Academic Program Status field becomes available.

Use Admissions Select to filter billed students based on admissions program status. The Admissions Program Status field becomes available. You can select this check box in addition to the Use Records check box. However, if you select both check boxes, the system checks academic program status first during the billing process to determine whether it should bill a student. It only uses admissions program status if a student has no academic program status.

Academic Career

Select the academic institution, career, academic program, and academic plan to bill.

Academic Program Status

Select the academic program status to bill. To generate bills based on academic program status, you must select at least one academic career and academic program on this page.

Admissions Program Status

Select the admissions program status to bill.

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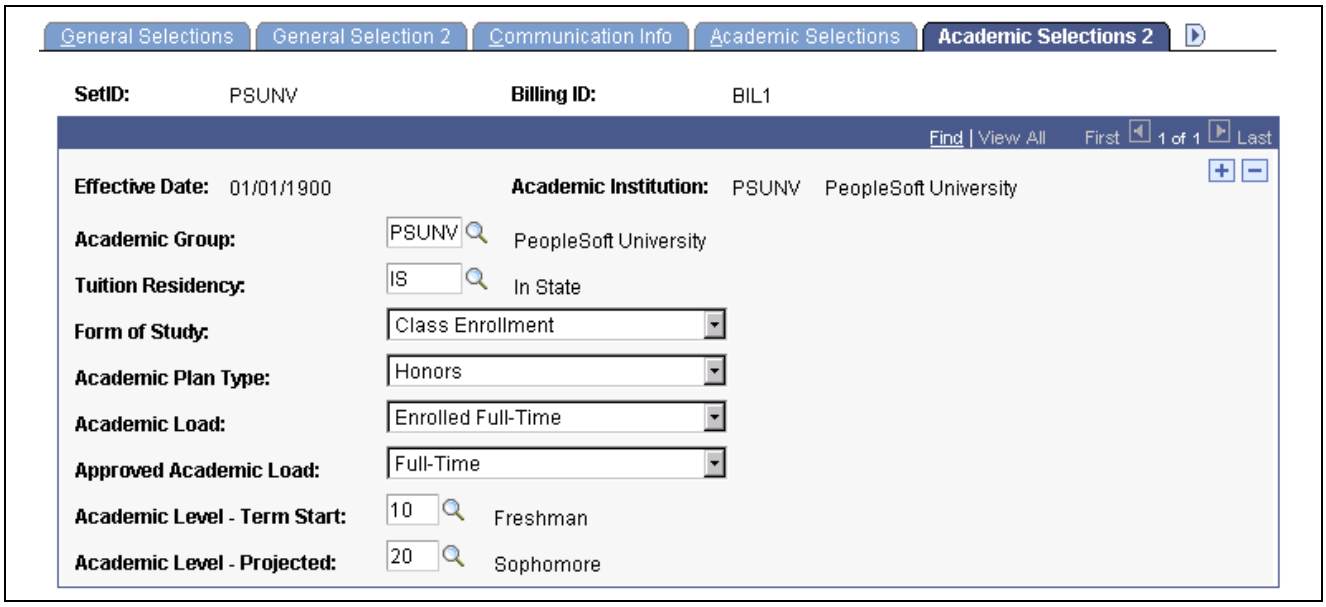
Defining Additional Academic Selections

Access the Academic Selections 2 page (Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Academic Selections 2).



Academic Selections 2 page

Select a value for any of eight academic categories to filter your billing process.

Note. The billing process acknowledges the selection criteria on this page only if you select a Bill By option of *Bill Range* when creating your billing request.

Selecting Billing Messages

Access the Billing Standard Request - Messages page (Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Messages).

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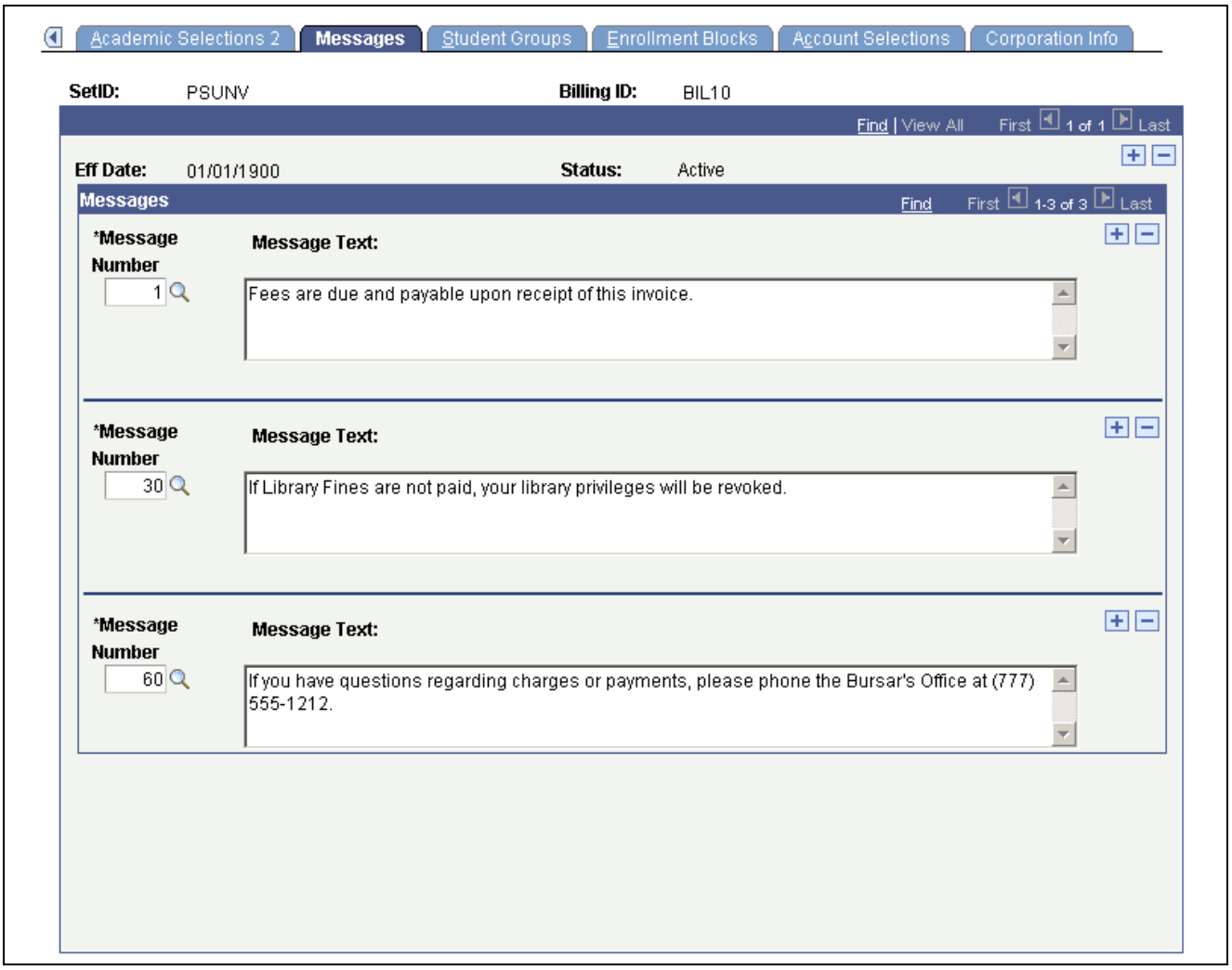

Billing Standard Request - Messages page

Message Number Enter the message number associated with the text that you want to appear on your bills. Remember that any business unit messages that you create appear on the bill, in addition to the messages that you select here.

Selecting Student Groups

Access the Student Groups page (Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Student Groups).

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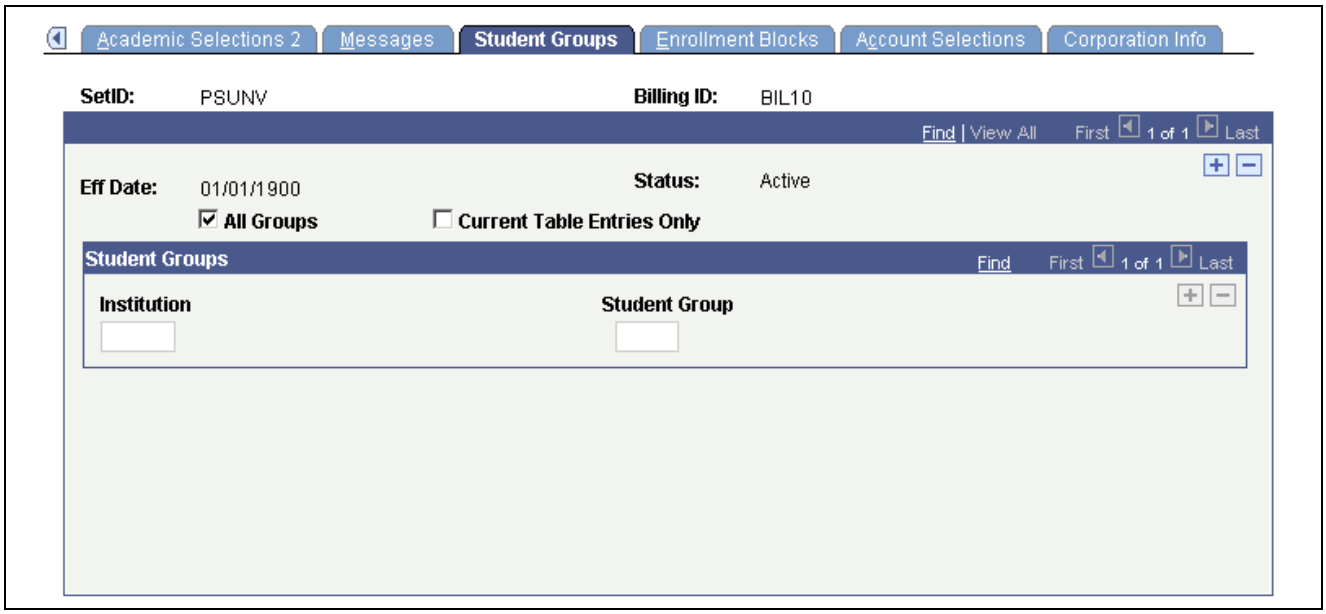

Student Groups page

All Groups Select to generate bills for all student groups. The Institution and Student Group fields become unavailable.

Current Table Entries Only Select to create bills and invoices only for students that are currently in the student groups that you specify in the Student Groups group box. The system excludes any students with a future-dated active status in a student group.

Student Groups

Select the institution and student group to bill.

See Also

lsad, Setting Up Prospects

Select Enrollment Blocks

Access the Enrollment Blocks page (Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Enrollment Blocks).

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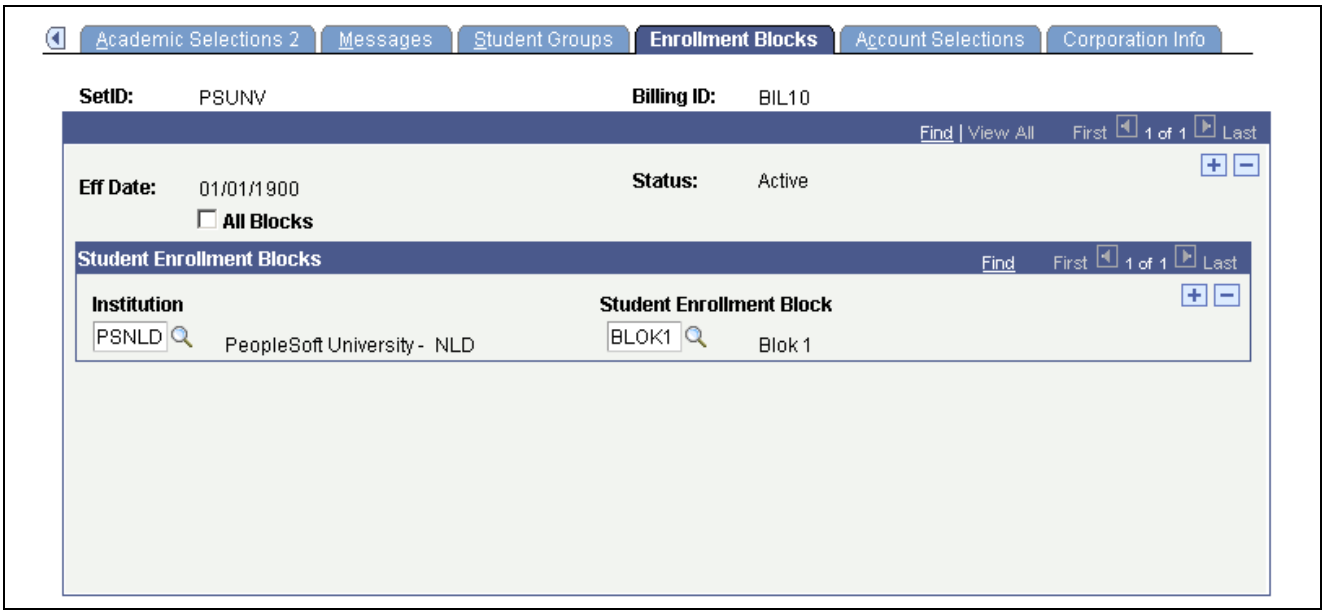

Enrollment Blocks page

All Blocks Select to restrict processing to all enrollment blocks

Student Enrollment Blocks

Restrict processing to specific enrollment blocks

Selecting Account Types

Access the Account Selections page (Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Account Selections).

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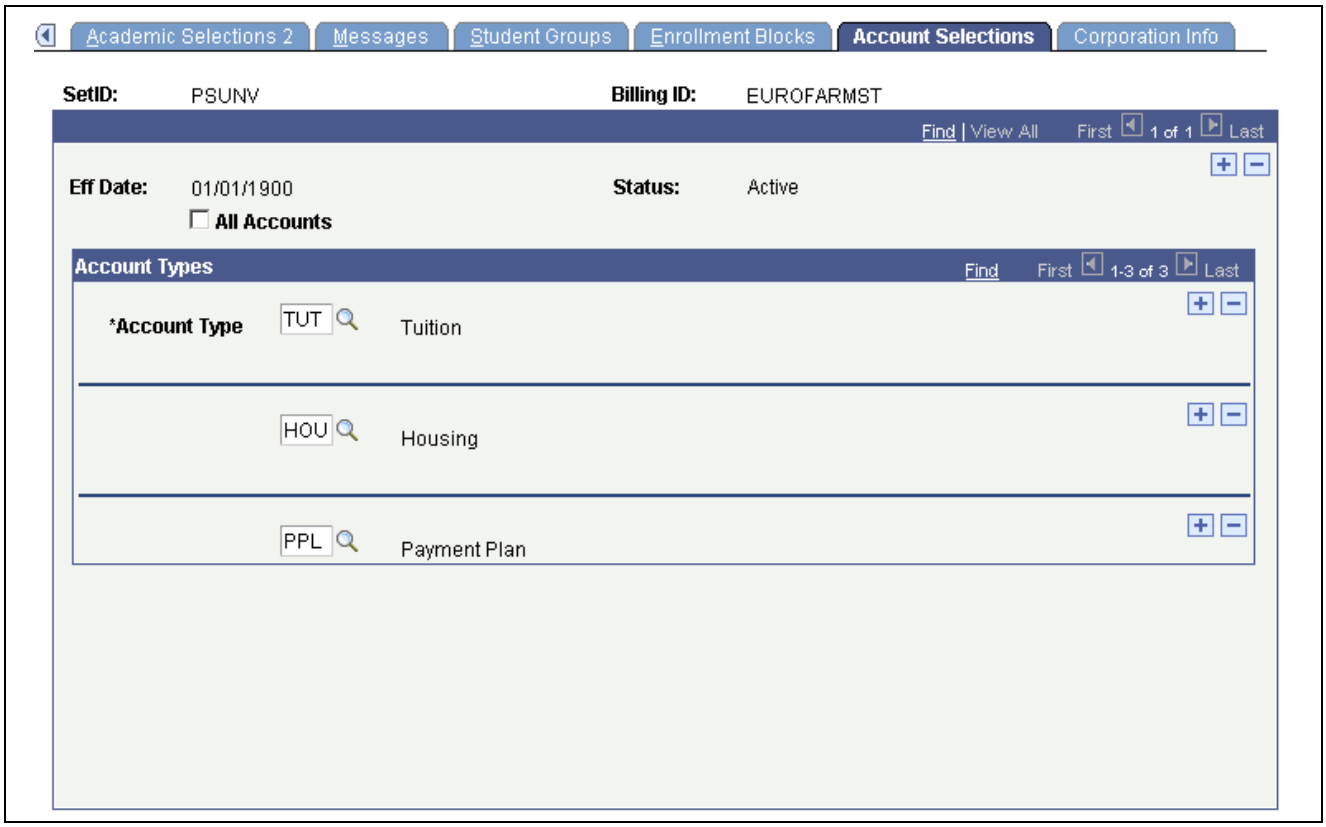

Account Selections page

You can determine by account type what charges and credits are included on an invoice.

An invoice is created for all unbilled activity on the account and through the account type or item type setup you can select what is included or excluded from the invoice.

All Accounts	Select to bill all account types.
Account Type	Enter the specific account types to include in an invoice, for example, tuition, housing, or payment plan.

Account Types

If you do not select the All Accounts check box, select a specific account type to bill.

Defining Corporation Information

Access the Corporation Info page (Set Up SACR, Product Related, Student Financials, Billing, Billing Standard Request, Corporation Info).

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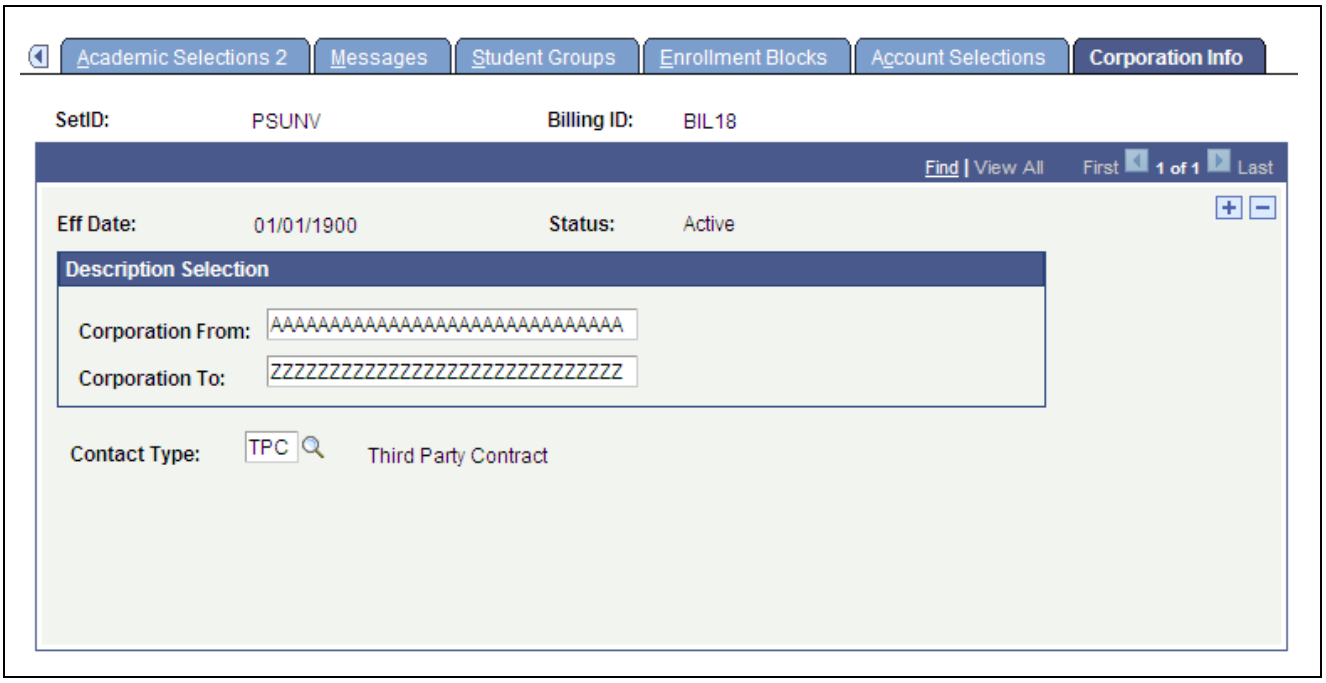

Corporation Info page

Corporation From and **Corporation To**

Enter an alphabetical range of corporations to bill. Leave these fields blank to generate bills for all corporations that meet the criteria that you set in this component.

Contact Type

To address corporate bills to a specific position (such as chief financial officer), select the type of contact.

This must be set. The system first uses this value to retrieve the preferred/primary contact defined on the Organization Table component in Campus Community. Then it uses the contact's address as the billing address to print on the invoice.

See [PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook - Update 1]Managing Organization Data .

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