

## BM1024 – Billing Type Table

The Billing Type table is required when you are using the Customer Accounts module. This table contains college-defined codes.

Use the Billing Type Table to:

- Define the type of billing document (for example, student statement, statement of account, invoice or second notice) that will be created.
- Define the program responsible for creating the billing document.
- Identify special printing requirements.
- Have standard messages printed on the billing document.
- Identify whether or not to exclude certain charge statuses.
- Indicate whether billing documents should be based on a particular reference date.

### User Function Keys

F1	REFRESH	Returns your cursor to the Billing Type field. Any changes or additions you made to the screen since you last pressed Enter will disappear.
F2	ADD	Adds a new billing type.
F3	CHANGE	Changes an existing billing type.
F4	INQUIRE or	Displays an existing billing type.
	SHOW ALL STATUSES	Displays when Add (F2) or Change (F3) is pressed. Displays all charge statuses.
F5	DELETE	Deletes an existing billing type.
F6	LIST	Lists existing billing types.
F8	MENU	Redisplays the FMS System menu.

### Data Fields

<a href="#">BILLING TYPE</a> (key; required)	<a href="#">PROCESS OPTIONS</a>
<a href="#">TITLE</a> (required)	<a href="#">BY CHARGE STATUS</a>
<a href="#">PROCESS ID</a> (required)	<a href="#">BY FEE CLASS</a>
<a href="#">OD REPORT LETTER</a> (required)	<a href="#">BY REFERENCE DATE</a> (required)
<a href="#">REVISION DATE</a> (display only)	<a href="#">PERIOD</a> (required)
<a href="#">STANDARD MESSAGE</a>	<a href="#">FREQUENCY</a> (required)

### Billing Type

<b>Definition</b>	Key field. Entry required. A code identifying the type of billing to be generated (for example, student statement, statement of account, invoice, or second notice).
<b>Length</b>	2 characters

## Title

<b>Definition</b>	Entry required. A description defined by colleges of a billing type. This description will appear on the billing document.
<b>Length</b>	20 characters

## Process Identification

<b>Definition</b>	Entry required. A process code defined by SBCTC-ITD identifying the program that prints the billing document.												
<b>Values</b>	Valid values defined by SBCTC-ITD are:  <table><tr><td><b>BM1861</b></td><td>Statement of accounts (customer reference)</td></tr><tr><td><b>BM1862</b></td><td>Statement of accounts (invoice number)</td></tr><tr><td><b>BM1863</b></td><td>Invoice</td></tr><tr><td><b>BM1864</b></td><td>Second notice</td></tr><tr><td><b>BM1865</b></td><td>Student statement</td></tr><tr><td><b>BM1866</b></td><td>Student mailer</td></tr></table>	<b>BM1861</b>	Statement of accounts (customer reference)	<b>BM1862</b>	Statement of accounts (invoice number)	<b>BM1863</b>	Invoice	<b>BM1864</b>	Second notice	<b>BM1865</b>	Student statement	<b>BM1866</b>	Student mailer
<b>BM1861</b>	Statement of accounts (customer reference)												
<b>BM1862</b>	Statement of accounts (invoice number)												
<b>BM1863</b>	Invoice												
<b>BM1864</b>	Second notice												
<b>BM1865</b>	Student statement												
<b>BM1866</b>	Student mailer												
<b>Length</b>	8 characters												

## Output Distribution Report Letter

<b>Definition</b>	Entry required. A code used to identify special printing requirements at the time the billing process is scheduled, for example, non-stock paper, 3-part NCR forms, laser printer, 8.5" x 11" white paper, and so on. Up to six (A through F) types of printing requirements can be defined for each billing document. A seventh OD report letter (G) is used exclusively for student mailers. These special printing requirements are defined on the Report Defaults Screen (JM1003) contained in the Job Scheduling module of the Production Management System (PMS).
<b>Length</b>	1 character

## Revision Date

<b>Definition</b>	Display only. A date assigned by the system indicating when the current record was changed or added.
-------------------	--

## Standard Message

<b>Definition</b>	A code used to retrieve a message defined by colleges to be displayed on a billing document.
<b>Length</b>	8 characters
<b>Edits</b>	Must be valid on the Standard Message Table (MM2004).

## Process Options

<b>Definition</b>	Ten codes identifying run-time options (for example, sort sequences) for a billing document. These options are similar to job scheduling parameters. If you do not enter any process options, CIS-defined default values are used.
<b>Length</b>	2 characters each code

## (Include Charges) By Charge Status

<b>Definition</b>	Twelve codes identifying which charges should be included when the billing document is printed. If you leave these fields blank, all charge statuses will be included.
<b>Length</b>	2 characters
<b>Edits</b>	Must be valid on the Charge Status Table (BM1025).

## (Include Charges) By Fee Class

<b>Definition</b>	Ten codes identifying which fee classes should be included or excluded when the billing document is printed. If you leave these fields blank, all charge statuses will be included.  To include all fee classes, leave all the fields blank. To exclude fee classes, type two carets (^) in the first field, and type the fee classes to be excluded in the other fields.
<b>Length</b>	2 characters
<b>Edits</b>	Must be valid on the Fee Class Table (BM1011).

## (Include Charges) By Reference Date

<b>Definition</b>	Entry required. A code identifying the reference date to be used in generating billing documents. This can be an actual date, one of several CIS-defined codes (see "Values" below), or a college-defined code from the Customer Accounts Date Table (BM1026).
<b>Values</b>	Valid values defined by SBCTC-ITD are:  <b>CHRG</b> Charge date - the date a charge was incurred <b>DUE</b> Due date - the date a charge is due for payment <b>INV</b> Invoice date - the date a charge was first invoiced
<b>Length</b>	6 characters

## Period Type

<b>Definition</b>	Entry required if Frequency is specified; otherwise, not allowed. A code indicating the type of period to be used in determining whether a charge should be included on the billing document.
-------------------	---

<b>Values</b>	Valid values defined by SBCTC-ITD are:  <b>D</b> Days <b>M</b> Months <b>Y</b> Years
<b>Length</b>	1 character

### Period Frequency

<b>Definition</b>	Entry required if Period is specified; otherwise, not allowed. A number identifying the number of periods past the reference date a charge needs to be in order to be included on the billing document.
<b>Length</b>	5 digits

### Updating the Table

To update the Billing Type Table, perform the following steps:

1. In the Billing Type field, type a billing type code.
2. Press the function key for the action you want to perform (Add, Change Inquire, Delete or List).
3. View, add or modify data as needed.
4. To save new or modified data, press Enter.