ILLiad Billing Manager & IFM

Atlas Workshop

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The session was abbreviated due to the late ending of previous sessions.

Slides from this presentation are available as a pdf at:

<http://www.idsproject.org/conferences/2008/idsbilling08.pdf>

The Billing Manager guide talks about everything she is covering today.

Lending Billing by Institution has to be set to yes if you want to bill institutions at a time period of your own setting. There is a series of tables that relate to how the charges are pulled in. If not charging someone, then make them exempt.

In billing manager mode, you have the option to reset testing. Do not go live until you really mean to. When you do so, billing manager points to real invoice tables rather than test tables.

You can set up reciprocal agreements (we charge what you charge), as well as separate categories of billing defaults.

In billing additions, there is a table where you can set up fees beyond category defaults (like photocopy charge)

Some billing shipping fees can be put on web site. (Billing and service options)

If you change your billing, you might need to reflect that in your policies directory.

EFTS (Electronic Funds Transfer System) has to be sent manually. IFM is sent automatically.

Can cancel an invoice, but not delete it. Can undo a range of invoices if last batch.

Questions? E-mail [training@atlas-sys.com](mailto:training@atlas-sys.com)