Billing an Account Example

Billing Examples · https://learn.logisense.com/docs/628555779/

Summary

In this example we will bill a single account and generate an invoice on the account when billing completes.

For additional details on the fields presented on the Account Packages screen see the Account Packages Screen screen help.

Prerequisites

- In order to bill the account you need to have at least one package in an active status added to the account. See the Account Package Example guide for instructions on adding a package to an account

Process

1. Log into the LogiSense Billing application
2. In the search box at the top of the page, leave the **Search Filter** set to *Account* and then enter the name of the account you wish to bill. Select the account from the list and then click the arrow button to go load the account's Overview page
3. Under the **Account** menu, click on the **Profile** menu option
4. On the **Account Package** screen add an account-package if one doesn't already exist. Make note of the **Next Bill Date** and then click the button to bill the account
5. On the pop-up that appears configure the billing options:
   a. Set the **Billing Period Start** and **Billing Period End** dates to includes the account-package's Next Bill Date (otherwise the account-package will not be billed)
   b. Enable the **Bill Charges** option (billing will result in an invoice being generated, although not

sent unless you also enable the ‘Deliver Invoice’ option)

c. Specify the Posting Date for this billing activity

6. Click the **Bill Now** button
7. A pop up notice should appear shortly stating that the bill run has been completed

After the bill run completes the options configured in the bill run should take effect (bill packages, generate an invoice, etc.). To validate this:

1. Check the **Next Bill Date** on the package billed. It should be incremented to its next billing date (a month forward in this case for a monthly package)
2. Check to see if an invoice was created on the account by loading the **Billing** screen
3. The first screen you’ll see is the **Invoices** screen where the newly created invoice should be displayed
4. Selecting the invoice and clicking on the **Transactions** tab will give you a break down of charges applied related to the account-package billed. In the image below the one time activation charge ($75.00) and recurring service charge ($50.00) from the Test Package have been properly applied

NEXT STEPS

- Account Invoice Management Example