# Bill Run Example

Billing Examples · https://learn.logisense.com/docs/636126229/

## Summary

Bill runs perform billing, invoicing and payment collection actions as well as execution of contract and accounts receivable terms (dunning rules). Bill runs can be triggered in either a manual 'one-off' fashion or using an automated recurring approach. The accounts that a bill run touches are determined by the bill groups that the accounts are under. Bill runs are associated with bill groups in order to bill accounts.

In this article we will cover how to setup and schedule a bill run that bills packages and generates an invoice.

For additional details on the fields presented on the bill runs screen see the Bill Runs Screen screen help article.

For an example on how to enable automatic payment collection on bill runs see the Bill Run Auto Pay Configuration Example.

## Prerequisites

- Currency exchange rates must be configured before bill runs can be setup
- Bill groups need to be setup in order to specify which accounts a bill run will bill

## Sample Configuration

### Creating a New Bill Run

1. Log into the LogiSense Billing application
2. Click on the **Setup** menu, **Finance** and then **Billing**

3. Under the Bill Runs heading click the  button to add a Bill Run
4. Under the **Add Bill Run** heading give the bill run a **Name** (e.g. 'Default'). As an example a bill run has been set to bill packages and generate an invoice on the billed accounts.
5. To specify the accounts that the bill run should bill it needs to be associated with one or more bill groups. Click on the **Bill Group** tab to select an existing bill group. In this example a bill group called ‘Default Bill Group’ is being added to the bill run
6. Next select the **Exchange Rates** tab and select the exchange rates to use when billing
7. Click **Save** to create the bill run

### Scheduling a One-Time Bill Run

In the example below we will add a one time bill run to bill the accounts that are under a bill group.

1. Ensure you have setup a bill group under the **Setup** / **Finance** / **Billing** / **Bill Group** screen
2. Navigate to the bill runs screen and ensure you have a bill run setup
3. Select the bill run and under the **Edit Bill Run** panel on the right click on the **Schedule** tab
4. To schedule a one time bill run click the  icon next to **Schedule** tab
5. On the modal that appears specify when the bill run should occur (e.g. ‘Schedule Now’) and the Billing period start and end dates. The dates will determine if a account-package is billed based on the account-package bill date (e.g. an account-package with a bill date of Nov 1st 2020 will not bill based on the bill period range set)
6. Click **Add** and then **Save** to add the one-time scheduled bill run
7. The bill run will now be listed on the **Scheduled** tab
8. Click **Save** on the Bill Run to save the schedule set and the bill run will execute

## Result

**Setup** / **Finance** / **Billing** / **Bill Runs**

When the scheduled bill run executes and finishes it will indicate when it started and completed on the **Completed** tab

**Account** / **Billing** / **Invoices**

When accounts are setup and billed by the bill run as configured above an invoice will be generated for transactions on the account within the bill run’s billing period.

To see the invoice that is generated along with the with package (subscription) charges load an account under the bill group that the bill run billed and access the **Invoices** screen.

## Next Steps

- **Optional**: If you utilize General Ledger codes you can configure these now or at a later time. See the General Ledger (GL) Code Configuration Example article for a configuration example
- You have now configured the system to the point where the products you wish to sell can be setup. The first step is to setup service types which are used when configuring services. See the Service Type Configuration Example for an example of how to setup service types