

Paperless Billing Overview



Customer Contacts may be established after a billing customer has been created. One or more billing customers can be associated to a single customer contact. Customer contacts are established to tie an email address to a customer, to facilitate automatic emailing of invoices.

Core-CT has set up inter agency billing *contacts* for each agency in the *Customers* page, to default *Email Invoice as Attachment* as their preferred communication method for invoices. The Email Invoice as Attachment feature is available only for XML Publisher invoices. If *Email Invoice as Attachment* is selected as the Invoice Media option, the invoice is sent as an attachment in an email to the *contact* on the bill. The following explains the configuration we have completed:

Customers > Contact Information

SetID: STATE Contact ID: APA001

Contact Information Find | View All First 1 of 1 Last

*Effective Date: 07/01/2012 *Status: Inactive

*Name: APA Accounts Payable Unit *Contact Flag: External Contact

Title:

Email ID: apainvoice@cga.ct.gov

Salutation Code: Salutation:

*Preferred Communication: E-mail & Print

Language Code: English

Person ID:

[Contact Customer Information](#) [Contact Phone and Type](#)

[User Profile](#)

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

- Generic AP Email Address for State Customer Contact ID

SetID: STATE Contact ID: APA001

Contact Information Effective Date: 07/01/2012 APA Accounts Payable Unit Find | View All First 1 of 1 Last

Link Contact to Customer Personalize | Find | View All First 2-4 of 4 Last

*Customer SetID	*Customer ID	Customer Name	Location	Credit Card	Documentation	Primary Bill To	Primary Ship To	Primary Sold To		
APAM1	APA001	Auditors of Public Accounts	1 Main	Credit Card	Documentation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
APCM1	APA001	Auditors of Public Accounts	1 Main	Credit Card	Documentation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DOTM1	APA001	Auditors of Public Accounts	1 Main	Credit Card	Documentation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Contact Information](#) [Contact Phone and Type](#) [User Profile](#)

- Associate each individual Agency Customer ID to State Contact ID

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Documentation

SetID:	STATE	Contact:	APA001	APA Accounts Payable Unit
Customer SetID:	DOTM1	Customer:	APA001	
Effective Date:	07/01/2012			

Documentation Personalize Find View All First 1 of 1 Last

*Document Code	*Preferred Communication	Number of Copies
INVC	Email Invoice as Attachment	1

- Configure *Email Invoice as Attachment* to default anytime Agency Customer ID is billed

With this set-up, once an invoice is finalized it is emailed for delivery. Emailing of invoices is accomplished during the *Finalize and Print* process by the BI_XMLPBURST program.

Billing > Maintain Bills > Standard Billing

Header - Info 1 Line - Info 1

Unit:	DOTM1	Invoice:	ST38990	Pretax Amt:	100.00 USD
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Status: RDY Invoice Date: Cycle ID: DAILY
*Type: ST Source: MISC *Frequency: Once
*Customer: APA001 SubCust1: SubCust2:
Auditors of Public Accounts
*Invoice Form: STANDARD From Date: To Date:
Accounting Date: 03/15/2013 Pay Terms: IMMED Pay Method: Check
Remit To: REMIT Bank Account: DOT1
Sales: STPAY Bill Inquiry Phone: (860) 594-2298
Credit: VPH Collector: ACCT REC
Biller: ACCTSREC Billing Authority:
Go to: Header Info 2 Address Copy Address
Notes Express Entry
Summary Bill Search Line Search Navigation: Header - Info 1 Page Series Prev Next

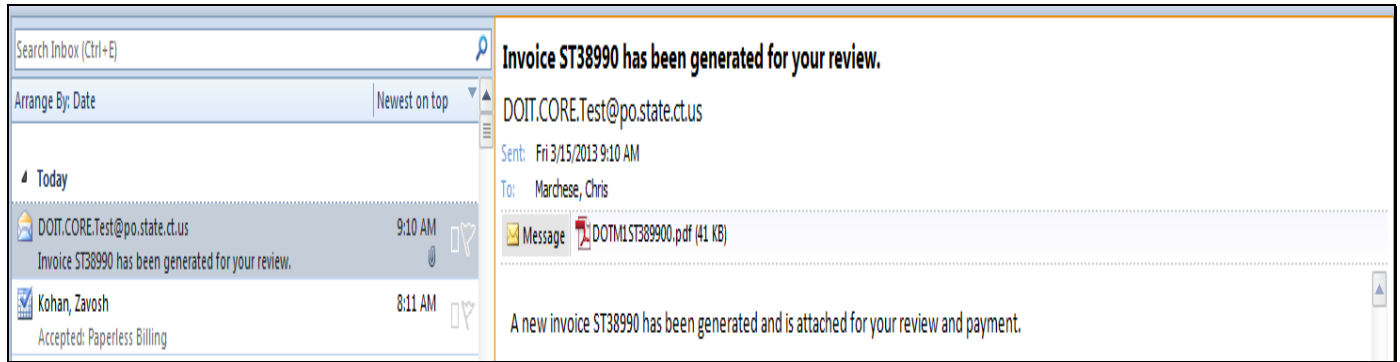
Header - Info 1 Address Info Line - Info 1

Unit:	DOTM1	Bill To:	APA001	Pretax Amt:	100.00 USD
Invoice:	ST38990	Auditors of Public Accounts			

Attention To: 1 Contact Name: APA Accounts Payable Unit
*Location: 1 Number of Copies: 1
Language Code: ENG *Invoice Media: Email Invoice as Attachment
Country: USA United States
Address 1: State Capitol 210 Capitol Ave
Address 2: Rms. 114-116
City: Hartford
County: Postal: 06106
State: CT Connecticut

- *Email Invoice as Attachment* defaults in as the **Invoice Media** option

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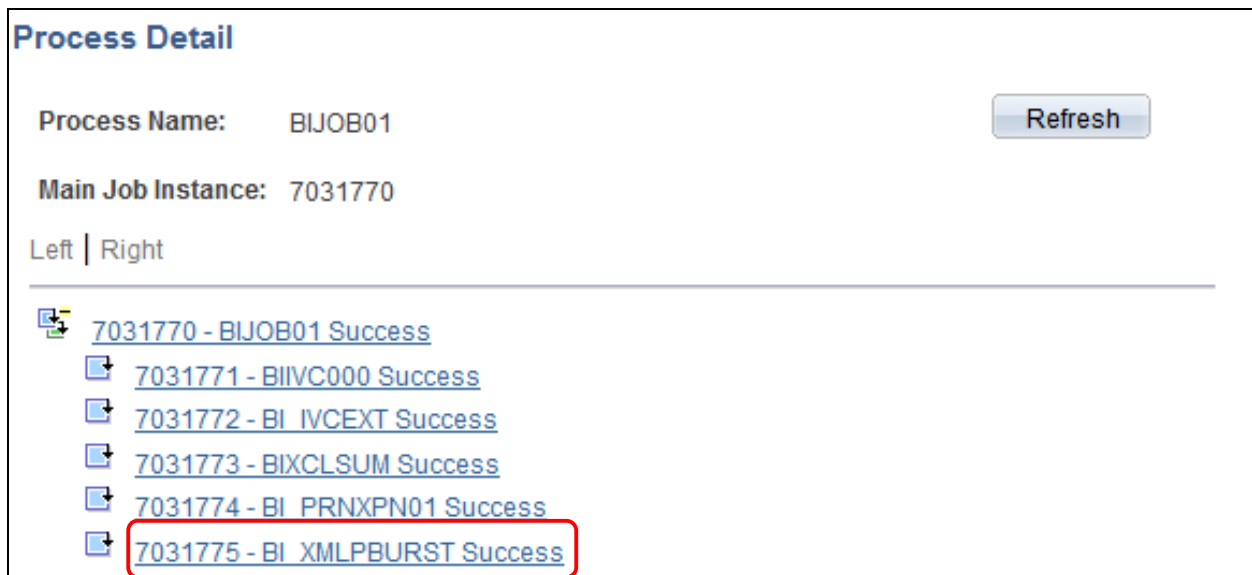


- Customer will receive an automatic email

Verifying Email

There are two ways of checking the results of the BI_XMLPBURST program in the Review Email Invoice Log component. A row is written to the log for each invoice that is processed. If the process cannot send an email, it updates the invoice error status with an error code. The email sent flag will remain *No*. When the error is corrected, you can run the process again to send the email. To resend an email, use the reprint component.

1. PeopleTools > Process Scheduler > *Process Monitor*



- BI_XMLPBURST emails the invoice to Customers

Paperless Billing Overview



Message Log

Process

Instance: 7031775 Type: Application Engine
 Name: BI_XMLPBURST Description: Invoice Bursting Program

Personalize | Find | View All | First 1-9 of 9 Last

Severity	Log Time	Message Text	Explain
	9:08:20AM	Calling BI_PRNXP01 program in burst mode.	Explain
	9:08:52AM	Invoice generated successfully for language: ENG	Explain
10	9:08:52AM	Total invoices processed: 1	Explain
10	9:09:28AM	Invoice Images attached: 1	Explain
10	9:09:28AM	Invoice Images that failed to attach: 0	Explain
10	9:09:28AM	Emails sent: 1	Explain
10	9:09:28AM	Emails failed: 0	Explain
	9:09:29AM	Published message with ID 91f742cb-8d71-11e2-8f3f-a8b42b6f52de to create entry in folder GENERAL.	Explain
	9:09:29AM	Successfully posted generated files to the report repository	Explain

Return

2. Billing > Review Processing Results > Review Email Invoice Log

Filter Options Results

Enter any information you have and click Search. Leave fields blank for a list of all values.

Process Instance:

Business Unit:

Invoice:

Email ID:

Email Status:

Message Set Number:

Message Number:

Primary Invoice:

Resend Invoice:

Search Clear

Filter Options Results

Search Results Personalize | Find | First 1 of 1 Last

Status Details

Process Instance	Business Unit	Invoice	Seq	Primary Invoice	Resend	Email Status	Message Text
7031775	DOTM1	ST38990	1	Yes	No	Success	Success