Overview of Changes in Billing

September 1, 2019

This overview contains information about changes to the Billing module with the SWIFT Limited Upgrade, including:

- Billing WorkCenter and Navigation Collections
- Credit Bills Approval Process
- AR Automatic Maintenance Process for Credit Bills
- New Warning on Single Action Invoice Process (SAIP)
- Enhanced Audit Logs
- Access to Customer and Contact Records
- Ability to Delete Canceled Bills

Note: There may be some changes to this information since SWIFT Limited Upgrade testing is still in progress. Questions? Contact us at: SWIFT.project@state.mn.us.

Billing WorkCenter and Navigation Collections

You will have the option of working in the Billing WorkCenter or one of several navigation collections.

- The Billing WorkCenter provides a centralized place where you can access frequently used pages, queries, processes, and reports.
- The Navigation Collections bring together related tasks, activities, and processes.

View the Billing Quick Start Guide to learn more about how the WorkCenter and Navigation Collections are organized.
Credit Bill Approval Process

The Approvals tile replaces the Worklist used in SWIFT 9.1. Staff will submit credits for approval and the requests will be routed to agency staff with the approval role as they are in SWIFT 9.1.

- Approvers will receive a Notification (Action) when bills have been routed for their approval. The request will display in the Approvals tile on the Pending Approvals page.

- Approvers can select the credit to view more detail and drill down to the credit bill.

- Requesters will receive a Notification (Alert) and an email notifying them when a request has been approved or denied.
Automatic Maintenance of Credit Bills

If you create bills using the Adjust Entire Bill process, the AR Automatic Maintenance process will automatically create Maintenance Worksheets that offset the original bill with the credit bill. AR Staff will no longer have to create maintenance worksheets for a large percentage of credits.

- The Automatic Maintenance process will run in the nightly batch, along with the ARUpdate process that posts the maintenance transactions to customer accounts.
- The process will only work with credit bills created with the Adjust Entire Bill process and the items must have the same credit and debit balances.
- AR Staff will need to manually create the maintenance transactions if the credit bills were created using a different process.
- Your agency must monitor open credits to ensure that they are being processed correctly.

New Warning on Single Action Invoice Process (SAIP)

A new SAIP warning will display for the first process (BIIVC000) listed on the Process Detail page. You’ll need to check the Message Log to see which of following situations has been detected:

- An Invoice Error has occurred, such as the Invoice Date is before the Customer Effective Date.
- No invoices were found to process based on the criteria entered. If you are rerunning SAIP after resolving an error such as a Budget Check error, you can ignore this warning. If you are processing the invoices through SAIP for the first time, you’ll need to trouble-shoot as you would normally: double-check your criteria, ensure that the invoice(s) were set to “RDY”, and ensure that credit bill(s) have been approved.

This warning will not halt processing of the SAIP process.
Enhanced Audit Logs

The new **View Audit Logs** link in the **Go To** section on the **Billing Summary** page enables you to view audit information about the bill.

Information on the **Audit Log** page includes:

- User ID who performed event.
- Event Codes: Create, Delete, Post
- Message Text explaining Event Codes
- Date / Time Stamp

Customers and Contacts

You’ll be able to access Customer and Contact records from within the Billing WorkCenter or the Customer Contact navigation collection.
Ability to Delete Canceled Bills

You will be able to delete canceled bills that display in the **Standard Bill Entry Search Results** using the **Delete Canceled Bills** page. In SWIFT 9.1 there is no option to delete these unwanted bills. This page can be found in the **Maintain and Process Bills** navigation collection.