

Billing Quick Start Guide

September 1, 2019

Starting in December 2019, there will be changes to SWIFT. While the new version will have a new look and feel, this upgrade will not affect how most processes are completed in SWIFT.

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.

This guide covers how to navigate to Billing module pages after the SWIFT/Portal Limited Upgrade. Options that you see in the module depend on your security roles. You may see more or fewer options than shown in this guide.

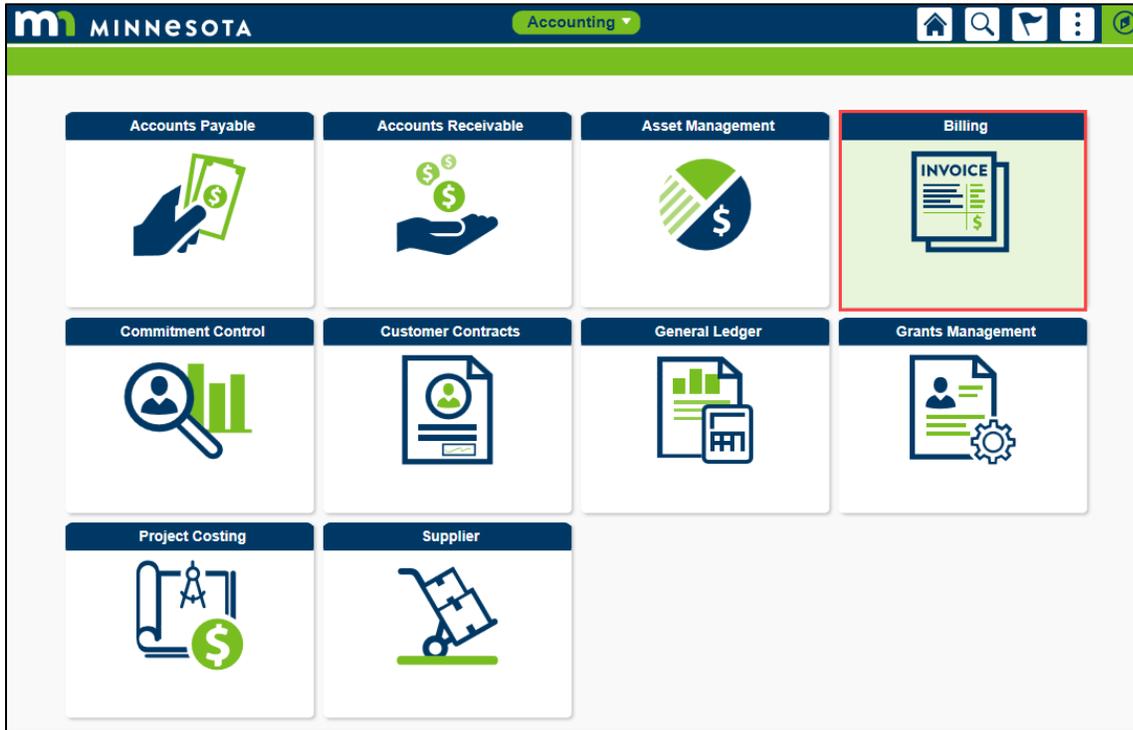
- Step 1: Navigate to the Billing Module
- Step 2: View Billing WorkCenter
- Step 3: View Billing Navigation Collections

Step 1: Navigate to the Billing Module

1. From **My Homepage**, select the **Accounting** tile.



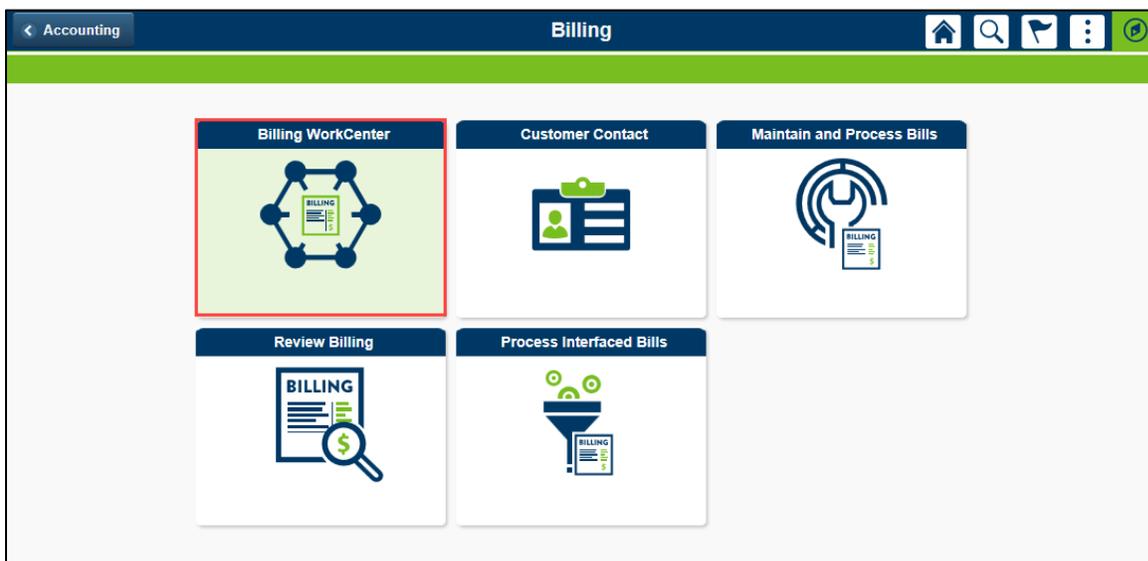
2. On the *Accounting* page, select the **Billing** tile.



Step 2: View the Billing WorkCenter

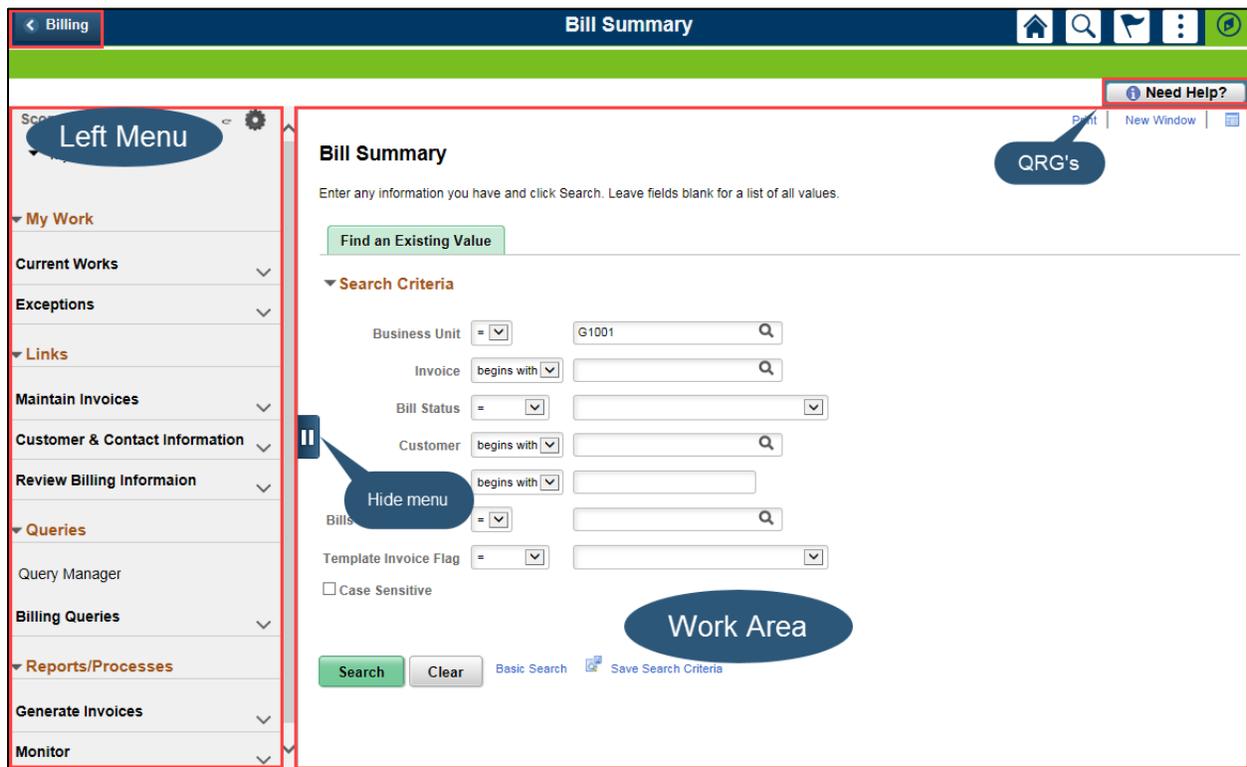
The Billing WorkCenter provides a centralized place where you can access frequently used pages, queries, processes, and reports.

1. Click on the **Billing WorkCenter** tile.



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- By default, the WorkCenter displays the *Bill Summary* inquiry in the **Work Area** on the right side of page.



- Expand the drop-downs in the **Left Menu** to select WorkCenter options.
- Click on the **Hide Menu** button to hide the **Left Menu**.
- Select the **Need Help?** button to access SWIFT QRG's and Help Desk contact information (top right of page).

- The **Left Menu** includes the **My Work**, **Links**, **Queries**, and **Reports/Processes** sections with the folders and pages described below.

Left Menu Section	Description of Folders and Pages
My Work	View unfinished transactions and exceptions. Folders and pages include: <ul style="list-style-type: none"> Current Works: Invoices not finalized, Pending Approval, or Not Submitted for Approval; Recurring Invoices not Generated or Recurring Schedules Expiring pages. Exceptions: Invoices in Error Status, Billing Interface Errors, Email Errors, Combo Edit Errors, and Budget Check Errors pages.

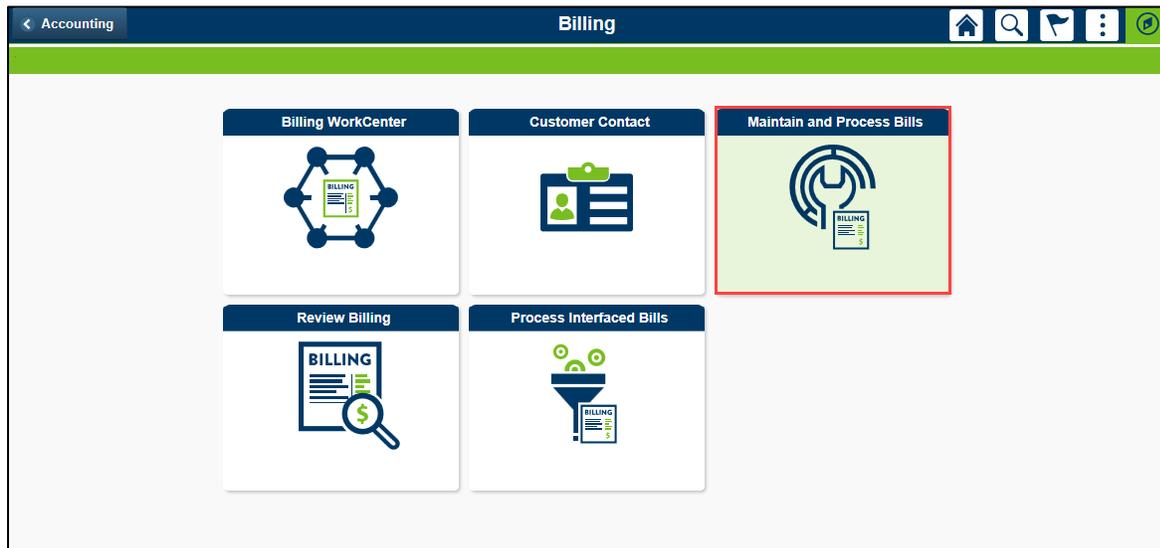
Left Menu Section	Description of Folders and Pages
Links	<p>Access commonly used pages. Folders and pages include:</p> <ul style="list-style-type: none"> • Maintain Invoices: Standard Billing, Adjust Entire Bill, Copy Single Bill, Create Recurring Bills, Delete Canceled Bill pages. • Customer & Contact Information: Customer General Information and Contact Information pages. • Review Billing Information: Bill Summary, Billing Details, and Review Invoice Errors pages.
Queries	Run frequently used Billing queries.
Reports/Processes	<p>Run frequently used reports and process. Folders and pages include:</p> <ul style="list-style-type: none"> • Generate Invoices: Single Action Invoice, Reprint Invoices, Correct Budget Check Errors, Billing Invoice Exceptions, and Process Billing Interface pages. • Monitor: Process Monitor, Report Manager, Query Viewer.

4. To return to the **Billing** homepage, click on the < **Billing** back button on the top-left of page.

Step 3: View the Billing Navigation Collections

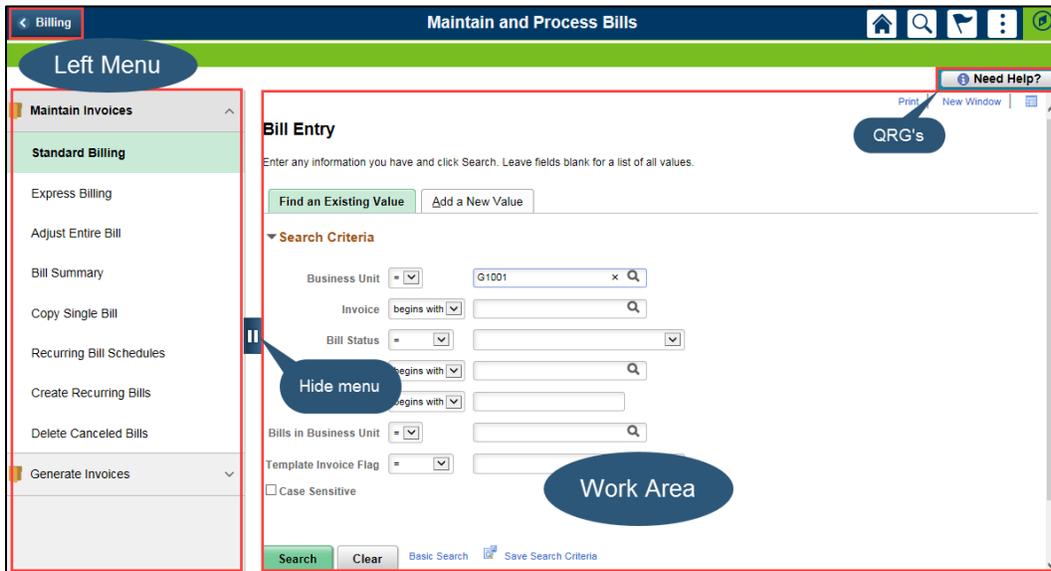
You can also work in navigation collections that bring together related tasks, activities, and processes.

1. For example, select the **Maintain and Process Bills** navigation collection tile.



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- Navigation collections also have a **Work Area** on the right and the **Left Menu**. You'll click on the drop-down arrows in the **Left Menu** to expand the menu of options. You'll select the back button on the upper-left to return to the **Billing** homepage.



- Here's a listing of the navigation collections in the Billing module and a description of their use.

Navigation Collection	Description of Folders and Pages
Customer Contact	The Customer <i>General Information</i> page opens by default. Folders and pages include: <ul style="list-style-type: none"> Customers and Contacts: Customer and Contact pages.
Maintain and Process Bills	The <i>Standard Billing Entry</i> page opens by default. Folders and pages include: <ul style="list-style-type: none"> Enter Bills: Standard Billing, Copy Single Bill, Create Recurring Bills, Adjust Entire Bill, and Delete Canceled Bills pages. Generate Invoices: Single Action Invoice, Correct Budget Check Errors, Billing Invoice Exceptions, Correct Stated Acctg Errors, Reprint Invoices, and Print Pro Forma pages.
Review Billing	The <i>Bill Summary</i> page opens by default. Folders and pages include: <ul style="list-style-type: none"> Review Billing Information: Bill Summary, Bill Details, Adjustment History, Recurring Bill Schedule, AR Pending Items, and Review Invoice Errors pages. Locate Bills: Bills Invoices, and Bills Not Invoiced pages.
Process Interfaced Bills	The <i>Process Billing Interface</i> page opens by default. Folders include: <ul style="list-style-type: none"> Interface Transactions: Process Billing Interface, Correct Interface Errors, Delete Pending and Error Trans, and Review and Update Pending Transactions pages.