Training Manual

Bill Presentation

**Purpose:** To view charges from billing areas that use the Bill Presentation system.

**Security Access Requirement:** Access is based on the business unit’s you have security to see in ConnectCarolina. Contact your department’s Access Request Coordinator (ARC) if you have questions about access.

**Prerequisites:** None.

**Find Help:** Call 919-962-HELP and the issue will be routed appropriately.
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Signing In

Sign in to connectcarolina.unc.edu using your Onyen and password.

1. In the Admin WorkCenter Links tile click on **Bill Presentation**.
Result: The filter screen will open, displaying the Business Units you have access to based on your ConnectCarolina security. If you do not have access to any units the system will display a message indicating that you cannot run the search report. You will however still be able to access the Business Contact and Business Website pages.

Note: ConnectCarolina data is updated nightly to the Bill Presentation tables providing the Dept IDs you are able to access based on your Onyen.

Search Parameters

1. Billing Areas: You can specify which areas you want included by selecting the area and then the Add button. If you do not make any selections, the search will be for all. You can also select multiple areas at the same time by holding down the “Shift” or “Ctrl” keys as you can in Excel.
2. Business Units: Select one business unit at a time from the dropdown box. If there is only one choice then it will default to that single business unit.

3. Acct Period Billing Range: Use the drop-down buttons to select the date range.

Note: The Year field indicates the calendar year, not the fiscal year.

4. Additional filters: Searches may also be done by Department Id, Fund, Source, Project Id, Program, Cost Code1, Cost Code2, and/or Cost Code3. You can either create a list of items, search by a range of items or do a wildcard search.
Notes:

- If you are doing a wildcard search for any of the Additional Filters you substitute a % for one or more characters – ex. 201% or %2480%.
- If you are searching by Department Id and enter an Id for which you do not have access you will receive a message in the report and it will not be included in your list.

5. When you have selected and added your filters, click the **Save** button.

![Filter Selection](image1)

### Creating the Report

1. When you have entered and saved the report parameters, click the **Run Report** button.

![Run Report Button](image2)

**Result:** The system displays the transaction that fit the search criteria. If you included in a department range or wild card search a department for which you do not have access, you will receive a message on the screen.

2. You can sort by any column by selecting the drop-down options from the column header.

![Sort Options](image3)
Note: If a chartfield string is modified in Customer Billing Management and the new string doesn’t pass budget check or chartfield check (“combo edit check”), Customer Billing Management replaces the modified string with a default chartfield string when posting to ConnectCarolina. A new indicator displays in Bill Presentation beside the affected transaction to show that the modified chartfield string was replaced by Customer Billing Management. If you select the “yes” indicator, a small window will appear with the original chartfield string and the error message.

3. You can export data to an Excel spreadsheet as well as return to the search screen to change the parameters. You can also view and then print in an invoice format by clicking on the Invoice Number.

Note: If a chartfield string is modified in Customer Billing Management but the new string doesn’t pass budget check or chartfield check (“combo edit check”), Customer Billing Management replaces the modified string with a default chartfield string when posting to ConnectCarolina. If you export the transactions to Excel, the original chartfield string and the corresponding error message will be displayed along with the default chartfield string that was substituted in.
Billing Area Contact Information

If you have a question for a billing area you can view their contact information directly from Bill Presentation.

1. On the Bill Area Contacts tab click the billing area you want to see.
2. Click the email address to send an email directly to that contact.

Billing Area Websites

Some billing areas have their own websites to provide additional information such as billing reports. You can access these sites directly on the Bill Area Websites tab.

1. On the Bill Area Websites Tab select the Bill Area Website you want to see.