

# ConnectCarolina 2018 User Conference

## CBM & Bill Presentation

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# Welcome





- CBM and Bill Presentation Overview
- Helpful Hints and Brief Demo
- Open Discussion on the system or billing processes
- Final Questions



- Customer Billing Management (CBM) is a tool that allows campus units to perform inter-department billing
  - Favorites – name Chartfield strings and use for requesting services such as Facilities, Telecom, and PrintStop
  - Department Defaults – allows a department to establish a default per billing unit (journal source)
  - Modify Charges – allows a department to change the chart field string from the default
- Bill Presentation – once a journal is submitted via CBM and posted by Accounting Services campus can view the charging details



## These billing areas send charges to CBM for modify charges before creating the journal and posting in Bill Presentation

INN	Carolina Inn	FBA	Faculty Benefits Administration
INR	Carolina Inn Room Stays	CEU	Friday Center CEU
CRC	Computer Repair Center	FRI	Friday Center Conference Center
AUX	Dining	BKP	ITS Software Acquisitions Annual Renewal
DIS	Dispatch Services	RFS	Remedy Annual Maintenance
FDX	ECommerce - FedEx	RIZ	Rizzo Center
FSD	ECommerce - Fisher Scientific (Dept)	PRK	Transportation and Parking
MSD	ECommerce - Mini Storeroom (Dept)	DPS	UNC Police
VWD	ECommerce - VWR Chemistry Storeroom (Dept)	HFP	UNCFP: APCF
ENT	Enterprise Rental Car	USS	University Student Stores
EHS	Environment, Health and Safety		



**These billing areas have the full chart string and send charges to a journal and Bill Presentation – not available in CBM to modify the CFS**

CCC	Carolina Copy	GSP	GSHIP (Graduate Student Health Insurance Program)
ARG	ECommerce - Air Gas	GRD	GradStar
FSC	ECommerce - Fisher Scientific	LSV	Laundry Services
FUL	ECommerce - Fuel Cards	OC1	One Card
MSC	ECommerce - Mini Storeroom	PRT	Print Stop
VWC	ECommerce - VWR Chemistry Storeroom	TEL	Telecom
UTL	Energy Services	UMS	University Mail Services
FSB	Facilities		



## Access to CBM and Bill Presentation

- Division MOU Leads and their designees grant access to CBM
- Bill Presentation access is based on your ConnectCarolina Finance Business Unit / Chartfield security

The screenshot shows the Connect CAROLINA website navigation menu. At the top, there is a blue header with the logo and two dropdown menus: "Favorites" and "Main Menu". Below the header, there are several blue buttons with icons and text: "SelfService", "Student Administration", "Finance", "HR/Payroll", "Enterprise Reporting", "General Links", "Teaching Resources", and "Research Resources". The "Finance" button is expanded, showing a list of links. The links "University CBM" and "University Bill Pres." are highlighted in yellow.

**Connect CAROLINA**  
Favorites ▾ Main Menu ▾

**SelfService**

**Student Administration**

**Finance**

- FS Workcenter
- Contracts Center
- Grants Center
- Program Management Center
- Project Costing Center
- Report Manager
- Proposal Management Center
- Query Viewer
- Works P-Card
- Finance Division Homepage
- Vendor Invoice Submission Page
- SPMS
- University CBM
- University Bill Pres.
- UAS
- Vendor Catalog / ePro

**HR/Payroll**

**Enterprise Reporting**

**General Links**

**Teaching Resources**

**Research Resources**



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 https://ccinfo.unc.edu

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Computer-Based Training  
 Course Descriptions

... a User Conference - October 18th **LEARN MORE**

## Making Payments

- Keeping Sensitive Information in Mind When Working with Attachments   9 min 
- Using the Customer Billing Management (CBM) System   25 min  
- Using the Bill Presentation System   15 min 



## Customer Billing Management

Welcome: Mechelle Clayton

- My Favorite Chartfield Strings
- Modify Current Charges
- Department Defaults
- Administration
- Reconciliation
- Transaction Files
- Receipt Manager
- ITS Reports
- ITS Only
- Logout

### Modify Current Charges

Department No:   Dept Ranges:

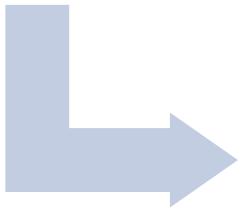
**Transactions**  Multiline Edit  Show Filter Row





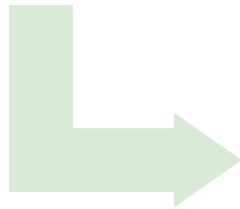
**First half of the month through 14<sup>th</sup>**

- Some agencies send transactions all month
- Transactions must be in CBM by 14<sup>th</sup>
- Departments can review them any time



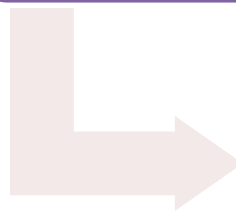
**All month through the 21<sup>st</sup>**

- Campus departments review and update chartfield strings on transactions
- *Note: Carolina Inn can only enter department*



**22<sup>nd</sup> of the month**

- The month's transactions are pulled from CBM & reviewed and posted by Accounting Services



**A few days later**

- Transactions and invoice in Bill Presentation



- My Favorite Chartfield Strings
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### Modify Current Charges

Allocation Edits List retrieved for Allocation Import ID: 2559494 @Mon Oct 15 10:07:31 EDT 2018

Department No:   Dept Ranges: 224900 - 225500

**Transactions**  Multiline Edit  Show Filter Row

Send To CC	Dept	Status	Src	Invoice#	Trans Date	PID/Onyen	Qty	UOM	Cost/Unit	Total\$	Description 1
10/22/2018	224900	MODIFIED	FDX	20181010	9/24/2018					\$7.51	FEDEX: 18164048
10/22/2018	224910	REVIEWED	MSD	20189190	9/18/2018		1	CS	\$29.50	\$29.50	MINISTOREROOM
10/22/2018	224951	MODIFIED	USS	2640160206	9/21/2018	709617415	1	EA	\$6.70	\$6.70	POSTAGE / STAMP
10/22/2018	224951	MODIFIED	USS	2740154930	10/1/2018	709617415	1	EA	\$6.70	\$6.70	POSTAGE / STAMP
10/22/2018	224951	MODIFIED	USS	2610154398	9/18/2018	709617415	1	EA	\$7.25	\$7.25	POSTAGE / STAMP
10/22/2018	224951	MODIFIED	USS	2700031363	9/27/2018	709617415	1	EA	\$62.86	\$62.86	UTILITY
10/22/2018	224951	MODIFIED	USS	2710154791	9/28/2018	709617415	1	EA	\$6.70	\$6.70	POSTAGE / STAMP
10/22/2018	224951	MODIFIED	USS	2710154792	9/28/2018	709617415	1	EA	\$33.70	\$33.70	POSTAGE / STAMP
10/22/2018	225401	NOTREVIEWED	DPS	180276	9/30/2018	-----				\$12,476.57	BW07 GUARD BIL
10/22/2018	225401	NOTREVIEWED	DPS	180260	9/16/2018	-----				\$11,702.54	BW06 GUARD BIL

Selected: 1 Transactions: 10

**Selected Transaction**

% Alloc	Valid	B Unit	Fund	Source	Account	Dept	Program	PC BUnit	Project	Activity	CC 1	CC 2	CC 3	Cust Ref	Trans id
100	Y	UNCCH	29519	19057	527420	228010									FDX:58..

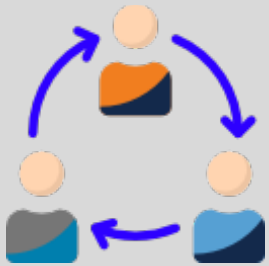
Add Allocation Row    Save Allocation    Validate Allocation Records

Favorites:



# The Panel would like your Feedback

About CBM/Bill Presentation or  
Billing Processes



**Thank You for Your Participation!**

