University of Pittsburgh: Custom Billing Fields Instructions

Contents

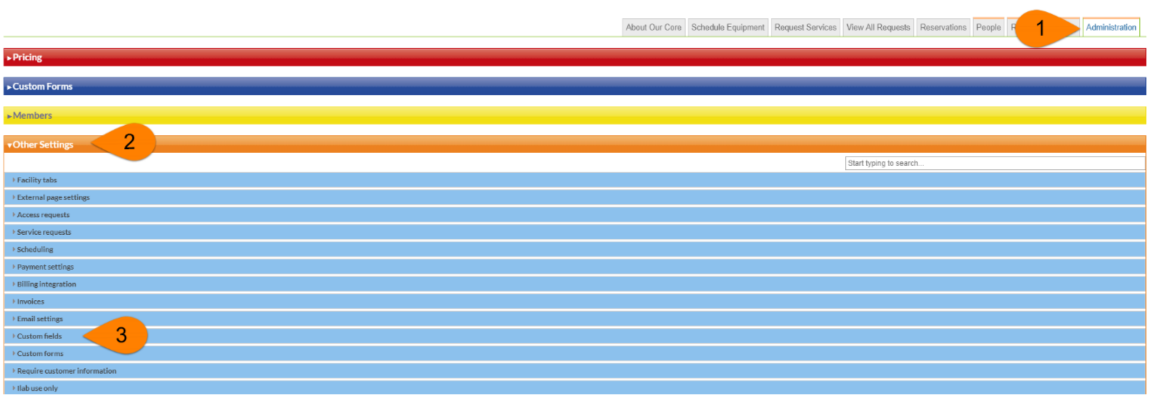
Custom Billing Fields

The custom billing fields contain accounting information that will be passed through in the billing file that is sent to Pitt GA. It is important that these fields are set for each core prior to their first billing event, or it could result in billing errors.

Navigating to Core Default Custom Billing Fields:

The core default custom billing fields should be set at all cores within the 'Administration' tab and will be the default accounts on services that do not have different custom billing information.

1. **Navigate to a core facility**
2. **Click the Administration tab**
3. **Choose 'Other Settings'**
4. **Choose 'Custom fields'**

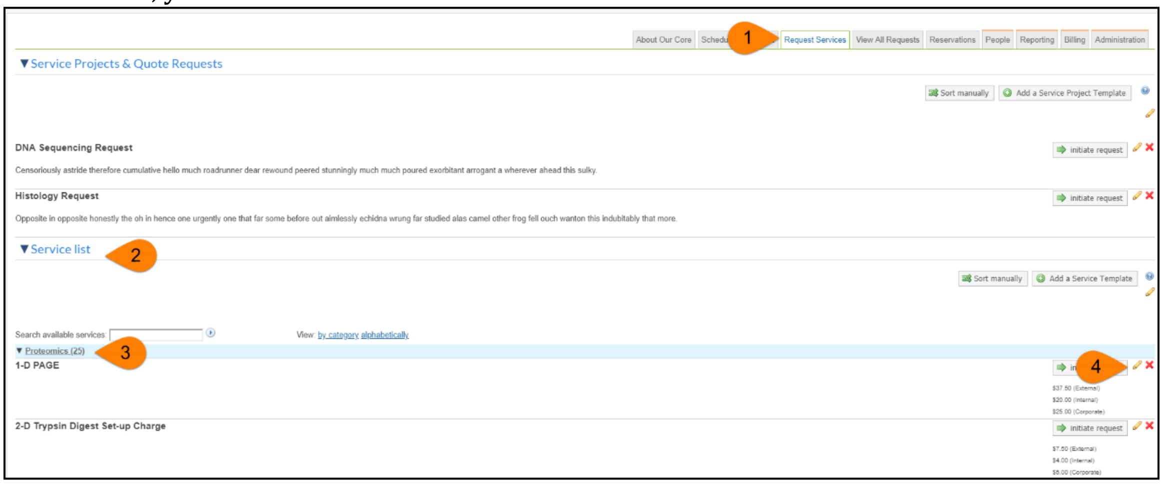


5. Refer to the section
6.
7.
8.
9.
10.

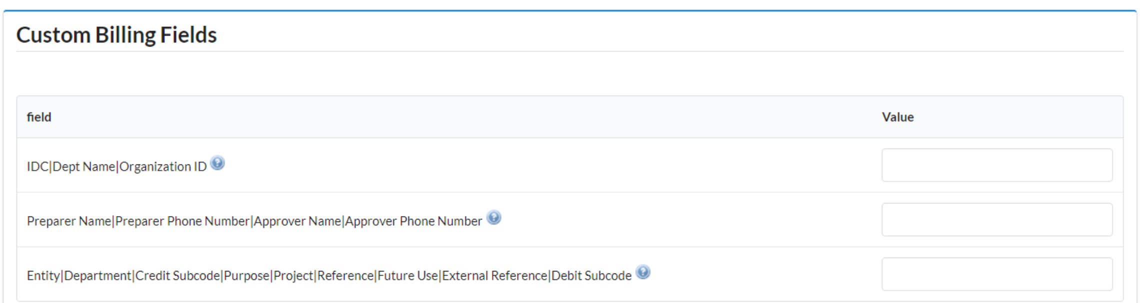
11.
12. Filling out Custom Billing Fields: to complete the custom billing fields

Navigating to Service Level Custom Billing Fields

If a service has different custom billing information than the core default custom billing information, you can enter it at the individual service level.



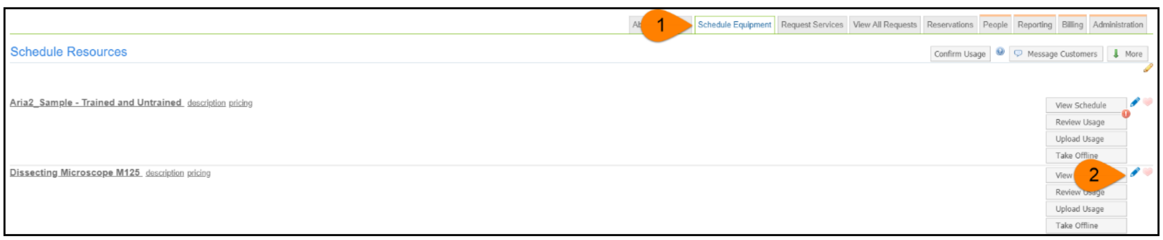
1. Navigate to the 'Request Services' tab
2. Expand the 'Service List' if it is not already expanded
3. If services have categories, expand the category that the equipment lives in
4. Click the yellow edit pencil on the service that you need to add custom billing fields to



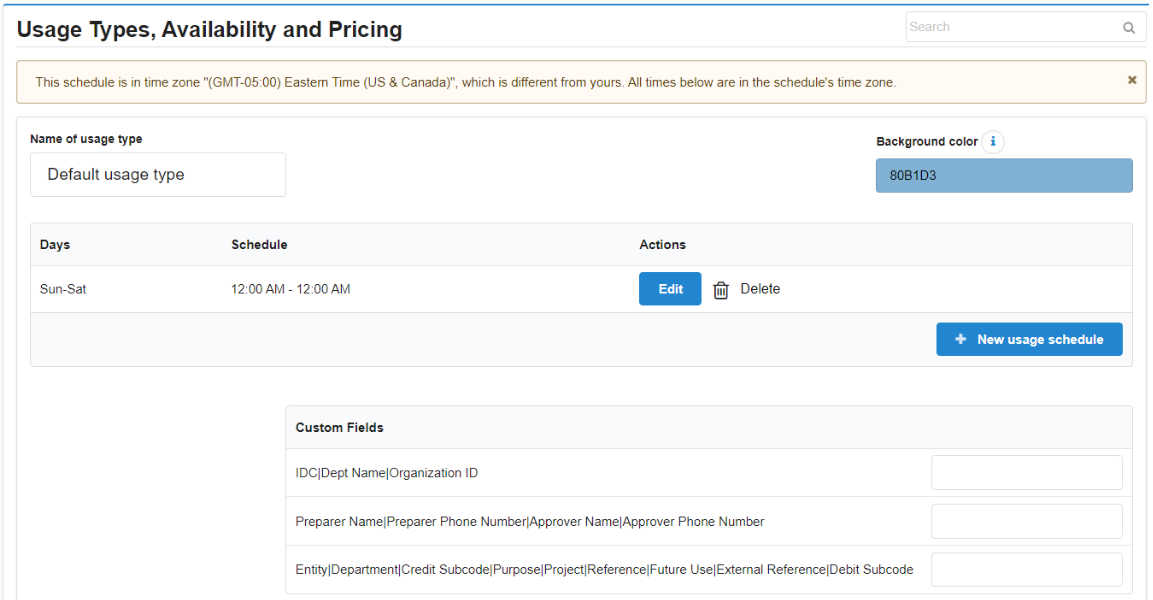
5. Within the service template scroll to the 'Custom Billing Fields' section
6. Refer to "
7.
8.
9.
10.
11.
12.
13. Filling out Custom Billing Fields:" to complete this section
14. Click save at the bottom of the service template.

Navigating to Equipment/Calendar Level Custom Billing Fields

If a piece of equipment has different custom billing information than the core default custom billing information, you can enter it for each calendar and each usage type on the calendar.



1. Navigate to the 'Schedule Resources' tab
2. Click the blue edit pencil next to the calendar you need to add custom billing information to.
3. Click 'Usage Types &Pricing' in the navigation menu. Each usage type can have different custom billing information
4. Complete the 'Custom Fields' section using the steps in the section
5.
6.
7.
8.
9.
10.
11. [Filling out](#) Custom Billing Fields:
12. Click 'Save usage type…' for each section you update the billing fields on



Filling out Custom Billing Fields:

<u>**Notes:**</u>

- Separating by a pipe (|) without spaces is important.
- If a value is not present, a pipe (|) must take its place. Look at the examples below.
- Only the 'Default value for…' fields need to be completed on the Administration tab.
- 'Default value for…. for **no-service** charges' will be the same as 'Default value for … for service charges.

Custom Billing Field 1: Unit| IDC|Dept Name|Organization ID [Required]

- IDC
  - First value in field separated by | (e.g. IDC) – 3 characters
  - Example: **IDC**|MICROSCOPY & IMAGING|L
  - In the image "1a"
  - **Required**
- Dept Name or Core Facility Name
  - Second value in field separated by | (e.g MICROCOPY & IMAGING)
  - Example: IDC|**MICROSCOPY & IMAGING**|L
  - In the image "1b"

  - **Required**
- Organization ID ("H" for Hillman, "L" for Lower, or "U" for Upper)
  - Third value in field separated by | (e.g L) – 1 character
  - Example: IDC|MICROSCOPY & IMAGING|**L**
  - In the image "1c"
  - **Required**

Custom Billing Field 2: Preparer Name|Preparer Phone Number|Approver Name|Approver Phone Number [Required]

- Preparer Name
  - First value in field separated by | (e.g. Carrie Waters)
  - Example: **Carrie Waters**|412-648-5674|Susan Ferline|412-383-5991
  - In the image "2a"
  - **Required**
- Preparer Phone Number
  - Second value in field separated by | (e.g 412-648-5674)
  - Example: Carrie Waters|**412-648-5674**|Susan Ferline|412-383-5991
  - In the image "2b"
  - **Required**
- Approver Name
  - Third value in field separated by | (e.g Susan Ferline)
  - Example: Carrie Waters|412-648-5674|**Susan Ferline**|412-383-5991
  - In the image "2c"
  - **Required**
- Approver Phone Number
  - Fourth value in field separated by | (e.g 412-383-5991)
  - Example: Carrie Waters|412-648-5674|Susan Ferline|**412-383-5991**
  - In the image "2d"
  - **Required**

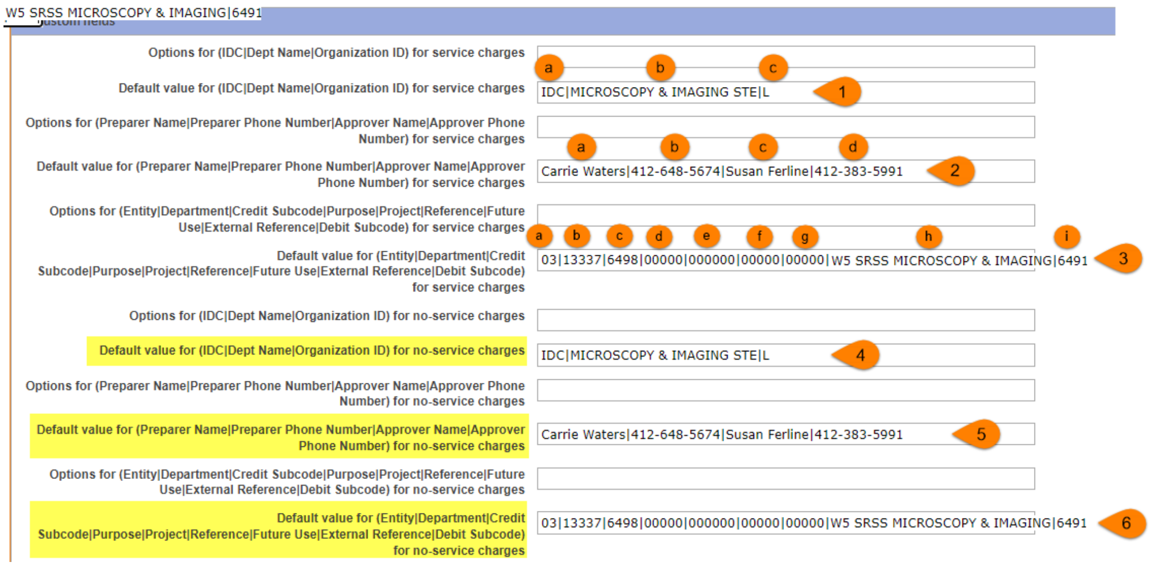
Custom Billing Field 3: Entity|Department|Credit Subcode|Purpose|Project|Reference|Future Use|External Reference|Debit Subcode [Required]

- Entity (entity of the PRISM account where cost recovery is recorded)
  - First value in field separated by | (e.g. 03)
  - Example: **03**|13337|6498|00000|000000|00000|00000|W5 SRSS MICROSCOPY & IMAGING|6491
  - In the image "3a"
  - **Required**
- Department (dept of the PRISM account where cost recovery is recorded)

- Second value in field separated by | (e.g 13337)
- Example: 03|**13337**|6498|00000|000000|00000|00000|W5 SRSS MICROSCOPY & IMAGING|6491
- In the image "3b"
- **Required**

- Credit Subcode (authorized subcode to record cost recovery credits)
    - Third value in field separated by | (e.g 6498)
    - Example: 03|13337|**6498**|00000|000000|00000|00000|W5 SRSS MICROSCOPY & IMAGING|6491
    - In the image "3c"
    - **Required**
- Purpose (purpose of the PRISM account where cost recovery is recorded)
    - Fourth value in field separated by | (e.g 00000)
    - Example: 03|13337|6498|**00000**|000000|00000|00000|W5 SRSS MICROSCOPY & IMAGING|6491
    - In the image "3d"
    - **Required**
- Project (project of the PRISM account where cost recovery is recorded)
    - Fifth value in field separated by | (e.g 000000)
    - Example: 03|13337|6498|00000|**000000**|00000|00000|W5 SRSS MICROSCOPY & IMAGING|6491
    - In the image "3e"
    - **Required**
- Reference
    - Sixth value in field separated by | (e.g 00000)
    - Example: 03|13337|6498|00000|000000|**00000**|00000|W5 SRSS MICROSCOPY & IMAGING|6491
    - In the image "3f"
    - **Required**
- Future Use
    - Seventh value in field separated by | (e.g 00000)
    - Example: 03|13337|6498|00000|000000|00000|**00000**|W5 SRSS MICROSCOPY & IMAGING|6491
    - In the image "3g"
    - **Required**
- External Reference (authorized IDC code and description)
    - Eighth value in field separated by | (e.g W5 SRSS MICROSCOPY & IMAGING)
    - Example: 03|13337|6498|00000|000000|00000|00000|**W5 SRSS MICROSCOPY & IMAGING**|6491
    - In the image "3h"
    - **Required**
- Debit Subcode (authorized subcode for charging customers)
    - Nineth value in field separated by | (e.g 6491)

- Example: 03|13337|6498|00000|000000|00000|00000|W5 SRSS MICROSCOPY & IMAGING|**6491**
- In the image "3i"
- **Required**



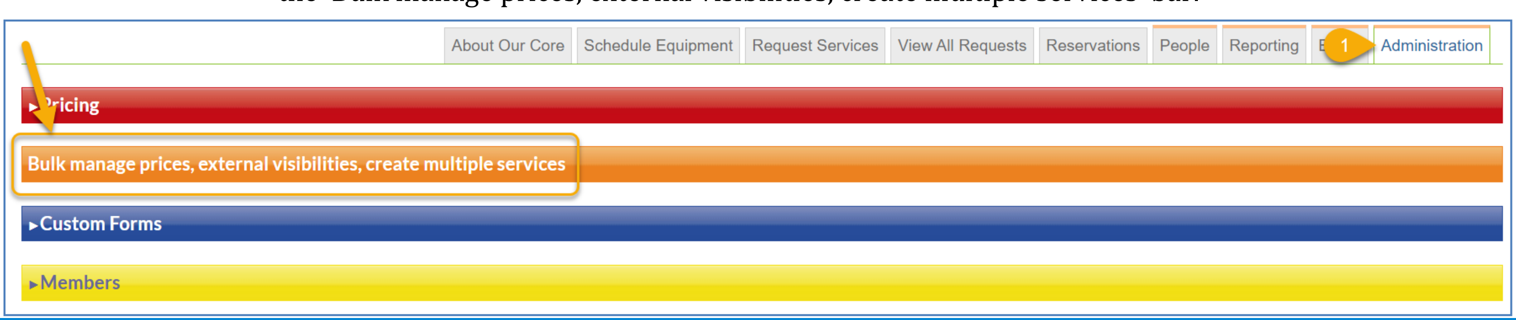
- Copy the values you just entered to 4, 5, and 6 in the screen shot, 'Default value for…. for no-service charges.'

Bulk Review and Updating Custom Billing Fields

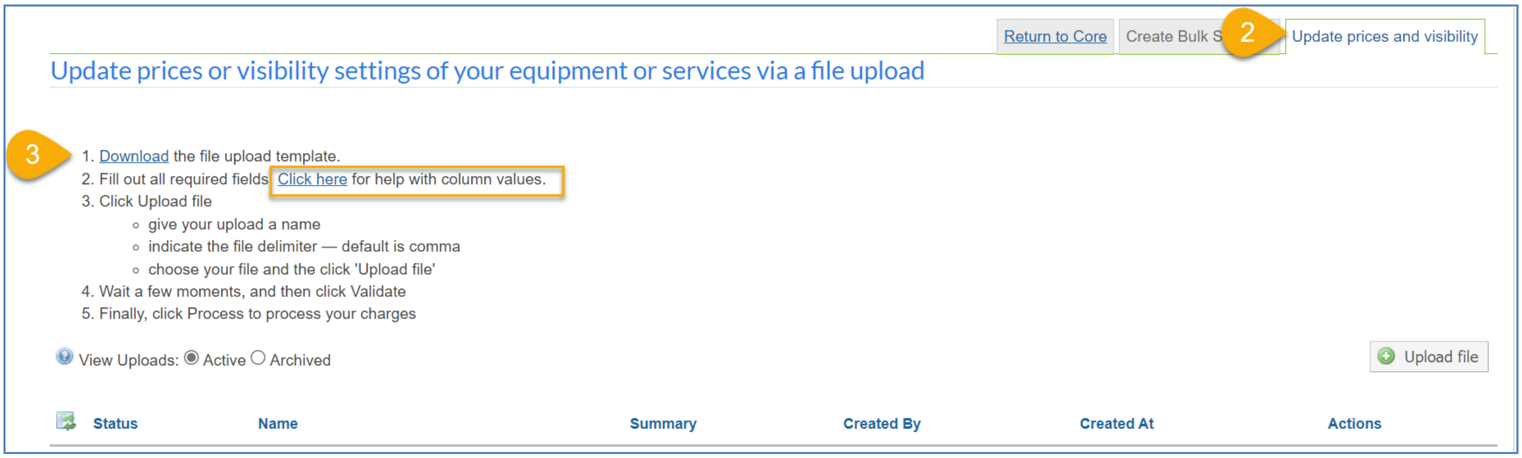
Cores have the option to download a list of existing services to review and bulk update their customer billing fields. A setting must be enabled by an iLab employee for the core to have access to bulk review and update services/equipment. Please contact your Agilent PM, CSM, or submit a support ticket asking that the setting "Allow core administrators and financial managers to bulk create and update services" to be enabled.

Institution admin tip: Institution admins can download a list of all cores existing services/equipment from the institution dashboard > Settings > Downloads > All services and price list.

1. Once the setting has been enabled, within the core on the administration tab click on the 'Bulk manage prices, external visibilities, create multiple services' bar.



2. Click on the 'Update prices and visibility' tab in the upper right corner.
3. Click on the 'Download' link to download the list of existing services that can be modified.
    a. This download will show all existing services/equipment and the rate for each price type.
    b. Cores can use this download to review services and equipment within their core.
    c. If cores need to update custom billing fields, proceed to step 4.



4. Within the file you will update columns titled "new_custom_field_1,2, and/or 3" with the full custom billing field string for the services/equipment rates.
    a. For additional template information, click the 'click here' link.
    b. Only the services/equipment that need to be set differently than the core default values need to be updated within this file.
    c. Notice there is a row for each price type, you will need to set the value for each price type for the service/equipment you're updating.
5. Once you've updated all the services/equipment, save the file on your PC in a CSV format.
    a. File is required to be a CSV.
6. Click the 'Upload file' button on the right of the screen
7. Choose the saved CSV file and give it a name
8. Click 'Upload and process entries'
    a. File will appear in list below
9. Click 'Validate'
10. Once validation is complete click 'Process'

11. After the file has been processed you will see a summary indicating the file import success