Dealer Billing

This document details the items involved in Dealer Billing. See the Dealer Billing Guide for more detailed information.

Within the Supervisor Workstation

Options
Within the System section of the Options form, (Tools Menu – Options), review and set each option based on the company needs.

Accounting Company
Just to double check the link to Accounting, open the Accounting Companies form, (Maintenance Menu – Accounting Companies). Verify the applicable company is in place.

Monitoring Types
Within the Monitoring Types form, (Maintenance Menu – Setup – Monitoring Types), Add or Update the services and link the Accounting code to them that references the codes within the Accounting system.

- Each rule and exception to the rules need a Manitou Monitoring type to apply differing rates. They can point to the same code inside the Accounting system, they just need to be different in Manitou in order to set differing dollar amounts or rates.

Within the Operator Workstation

Customers
This could be the most labor intensive part of the work if there are a lot of new services or exceptions to the rules in the Monitoring Types. Ensure each customer, to be billed, has the correct services on their accounts. Services are found within the Customer record under the Services Jump To menu item.

Dealers
- Link the dealer to Accounting.
- If using Rate tables, add the Rate tables before adding the services.
- Add new recurring charges for the Dealer's billable services.
- Save

Reports
1. Customer Signal Count Generator (This need only run one time per server)
2. Dealer Billing Generate – Exception list of unbilled services/customers.
3. Dealer Billing Preview – What the billing looks like for the period.
4. Dealer Billing Post – Send data to Accounting. NO GOING BACK

Important Notes:

Prior to establishing Dealer Billing features inside Manitou please do the following:

- Verify Manitou link between it and accounting is functioning and Manitou can see accounting.
- Build applicable Billing codes to use for Dealer Billing within the Accounting package.
- SedonaOffice – Ensure services inside SedonaOffice read NR (Non-recurring).
- If the dealer billing reports are not visible Restore Defaults within the Report Templates. (SWS – Reports – Report Templates)
- Start date on Customer services define date to start billing for the individual services.