



Advance Billing Maintenance

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Update Bill Rule Methods

- Manual
- Fees & Charges Update
- Bill Rule Wizard
- Escalation Index Maintenance

Manual Update

PROS

- Best method to use if the update affects one or two Bill Rules in one Agreement

CONS

- Labor intensive if the update affects multiple Agreement with the same Bill Rule
- Requires Agreement to be set back to Billable
- Does not generate a User Log File

Fees and Charges Update

PROS

- Less manual data entry required
- Increases accuracy

CONS

- Caution needs to be exercised due to the global update functionality

Bill Rule Wizard Update

PROS

- Less manual data entry required
- Increases accuracy
- Allows user to specify items such as:
 - Campus
 - Agreement Class
 - Agreement Type
 - Agreement Status
 - Billing Status

CONS

- Caution needs to be exercised due to the global update functionality

Bill Rule Wizard Update - continued

PROS

- Multiple fields can be updated – not just the Charge/Unit and Dates
- User can preview the Bill Rules to be updated
- User can remove any Agreements from the Update before proceeding
- Process generates a User Log

CONS

Escalation Index Maintenance

PROS

- Rates can be adjusted by a percentage
- Multiple Indexes can be applied
- Multiple Bill Rule Categories/Types can be selected
- User can include or exclude items for update such as:
 - Campus
 - Agreement Class/Type
 - Agreement Number

CONS

- Typically the use of an Index type increase is not used widely making the set up effort less beneficial for a handful of agreements

Escalation Index Maintenance - continued

PROS

- User can specify a date the Update is affective
 - Current Date
 - Invoice Date
 - Specify a Date
- Back Billing option
- Impact Report
- Process generates a User Log Report

CONS

- Specific Bill Rules should ideally be created for use with this functionality

Fees and Charges vs Bill Rule Wizard

SCENARIOS	FEES & CHARGES UPDATE	BILL RULE WIZARD
Update the Rate & ExpDate	YES	YES
Update Any field in Bill Rule	NO	YES
How updating Rate affects Agrmt with same Bill Rule with different date ranges.	Updates the latest Bill Rule	Depends on setting – default is ALL
How updating Exp Date affects Agrmt with same Bill Rule with different date ranges.	Those Agrmts are ignored, but all other Agrmts are processed	Will only update the eligible Bill Rules. The log file will show which rules were not updated due to overlaps in Exp Date before Eff Date

Fees and Charges vs Bill Rule Wizard - continued

SCENARIOS	FEES & CHARGES UPDATE	BILL RULE WIZARD
Add a Bill Rule	Only Adds Bill Rule if it already exists in the Agrmt	Adds Bill Rule to any Agrmt that meets the Filter Criteria
How the functionality handles Adding Bill Rules that overlaps with existing Bill Rules in an Agrmt	Stops the entire operation	Gives notification of records that overlap. Ignores those Agrmts but creates all other Bill Rules that do not overlap.
Apply Rules (such as Taxes and Late Fees)	NO	YES

Fees and Charges vs Bill Rule Wizard - continued

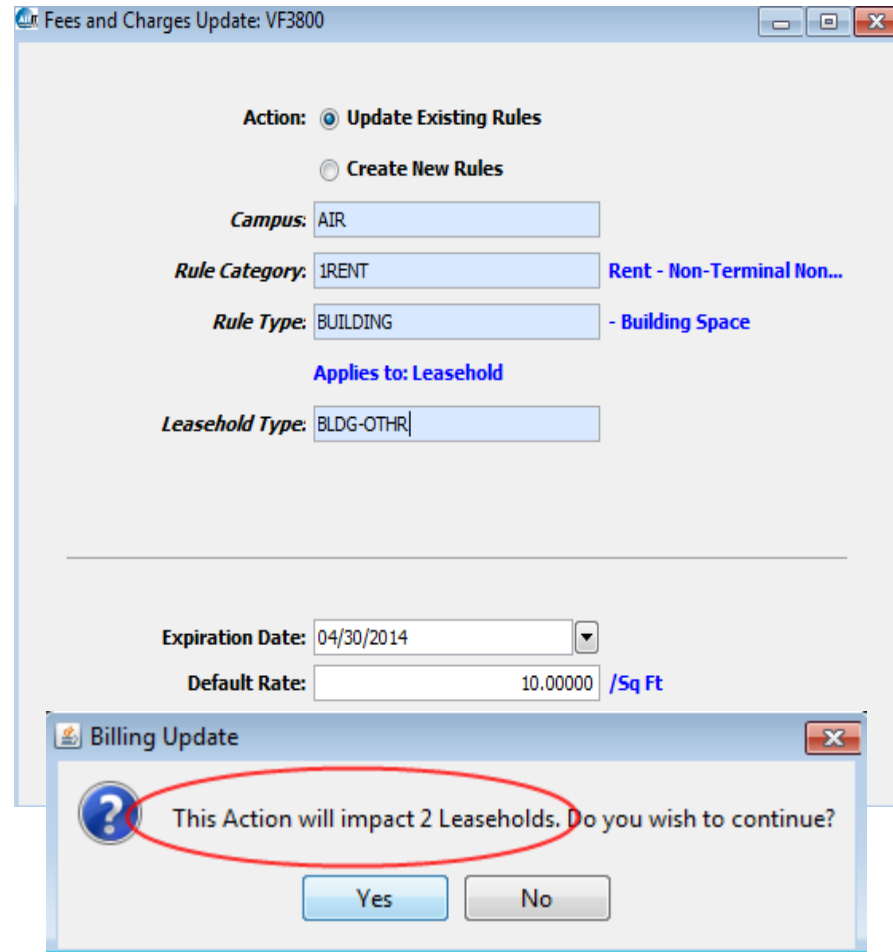
SCENARIOS	FEES & CHARGES UPDATE	BILL RULE WIZARD
Step Charges	NO	YES
Filtering Criteria	NO	YES
Deselecting specific Bill Rules	NO	YES
Preview of Bill Rules effected	NO – Just shows # of records to be processed	YES – On a screen and a report
Log report at end of process	No – Just shows # of records that were processed	Yes – Lists each Bill Rule processed

Fees and Charges Update

An Update of a Bill Rule

- Gives you a record count when you click **Apply**

The example shows that this Update will impact 2 Leasehold level Bill Rules



The screenshot displays a software window titled "Fees and Charges Update: VF3800". It contains several configuration fields:

- Action:** Radio buttons for "Update Existing Rules" (selected) and "Create New Rules".
- Campus:** Text box containing "AIR".
- Rule Category:** Text box containing "IRENT" with a dropdown arrow, and a label "Rent - Non-Terminal Non..." to its right.
- Rule Type:** Text box containing "BUILDING" with a dropdown arrow, and a label "- Building Space" to its right.
- Applies to:** Label "Leasehold" in blue text.
- Leasehold Type:** Text box containing "BLDG-OTHR" with a dropdown arrow.

Below these fields, there are two more fields:

- Expiration Date:** Text box containing "04/30/2014" with a dropdown arrow.
- Default Rate:** Text box containing "10.00000" with a label "/Sq Ft" to its right.

At the bottom of the window, a "Billing Update" dialog box is open, featuring a question mark icon and the text: "This Action will impact 2 Leaseholds. Do you wish to continue?". The dialog has two buttons: "Yes" and "No". A red oval highlights the text in the dialog box.

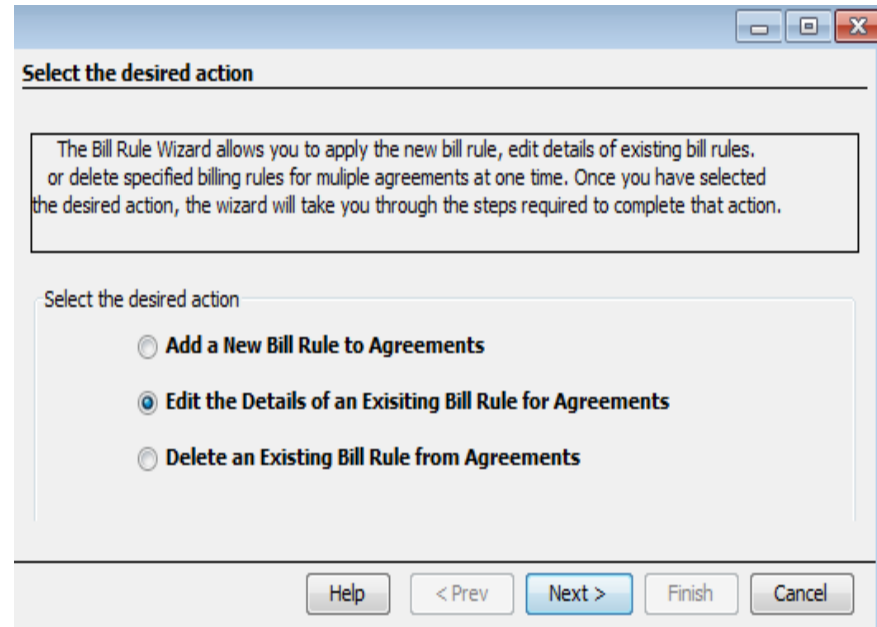
Bill Rule Wizard Update

An Update of the same Bill Rule using the Bill Rule Wizard

Step 1 – Select the desired action

- The user selects Edit the Details of an Existing Bill Rule for Agreement for the same update results as the Update Existing Rules option in the Fees and Charges Update

Note: the Steps will prompt the user through the Wizard



Bill Rule Wizard Update - continued

An Update of the same Bill Rule using the Bill Rule Wizard

Step 2 – Specify Bill Rule to be Processed

- The user selects the Bill Rule Category, Bill Rule Rule Type and Leasehold Type just like with the Fees and Charges Update

Specify Bill Rule to be Processed

This Screen requires you to specify the rule that will be created , edited, or deleted. For Edit and Delete operation , the affected rules can be further limited based on their effective a

Specify Bill Rule to be Updated

Rule Category: IRENT Rent - Non-Terminal Non-Def

Rule Type: BUILDING - Building Space

Applies to: Leasehold

Leasehold Type: BLDG-OTHR Building - Non-Terminal Non-global Rate

Limit affected bill rules by effective and/or expiration date(s)

Current Status	Rule Effective Dates	Rule Expiration Dates
<input checked="" type="radio"/> Active and Expired	<input checked="" type="radio"/> Before <input type="text"/> ▾	<input checked="" type="radio"/> Before <input type="text"/> ▾
<input type="radio"/> Active Only	<input type="radio"/> After	<input type="radio"/> After
<input type="radio"/> Expired Only		

Note: There is a Limit affected Bill Rules by effective an/or expiration date(s) option that is NOT available in the Fees and Charges Update

Bill Rule Wizard Update - continued

An Update of the same Bill Rule using the Bill Rule Wizard

- Once the Limit box is checked, filter options for Current Status, Rule Effective Dates and Rule Expiration Dates become active.

Note: This is an optional filter. If limiting is not necessary do not check the Limit box.

Specify Bill Rule to be Processed

This Screen requires you to specify the rule that will be created , edited , or deleted. For Edit and Delete operation , the affected rules can be further limited based on their effective and expiration dates.

Specify Bill Rule to be Updated

Rule Category: Rent - Non-Terminal Non-Def

Rule Type: - Building Space
Applies to: Leasehold

Leasehold Type: Building - Non-Terminal Non-global Rate

Limit affected bill rules by effective and/or expiration date(s)

Current Status	Rule Effective Dates	Rule Expiration Dates
<input checked="" type="radio"/> Active and Expired	<input checked="" type="radio"/> Before <input type="text"/> ▾	<input checked="" type="radio"/> Before <input type="text"/> ▾
<input type="radio"/> Active Only	<input type="radio"/> After	<input type="radio"/> After
<input type="radio"/> Expired Only		

Bill Rule Wizard Update - continued

An Update of the same Bill Rule using the Bill Rule Wizard

Step 3 – Limit Agreements to be Processed

- The user can narrow the Update by specifying
 - Campus
 - Agreement Class
 - Agreement Type
 - Agreement Status
 - Billing Status

Note: The user can pick a specific option or can use the **ALL** default.

Limit Agreements to be Processed

This Screen allows you to limit the Agreements that will be processed for the se
You may limit the Agreements based on the parameter below.

Limit the Agreements that will be processed:

Campus: [AirIT International Airport](#)

Agreement Class: [All Agreement Classes](#)

Agreement Type: [All Agreement Types](#)

Agreement Status: ▼

Billing Status: ▼

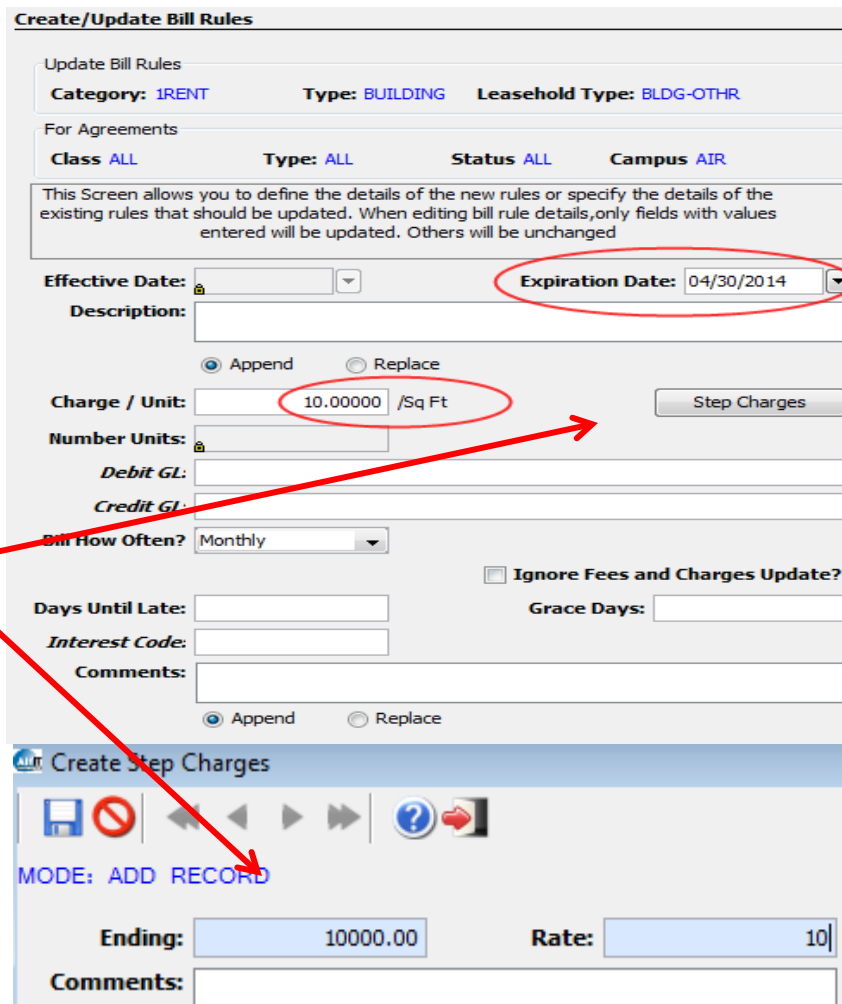
Bill Rule Wizard Update - continued

An Update of the same Bill Rule using the Bill Rule Wizard

Step 4 – Create/Update Bill Rules

- On this screen the user can update all fields shown in white
- In this example we are updating the Exp Date and Rate only
- Click the Step Charges button if the rate escalates based on specific break points

Note: The Append and Replace options refer to the field directly above each and **NOT** the entire screen.



Create/Update Bill Rules

Update Bill Rules
Category: 1RENT **Type:** BUILDING **Leasehold Type:** BLDG-OTHR

For Agreements
Class: ALL **Type:** ALL **Status:** ALL **Campus:** AIR

This Screen allows you to define the details of the new rules or specify the details of the existing rules that should be updated. When editing bill rule details, only fields with values entered will be updated. Others will be unchanged

Effective Date: [] **Expiration Date:** 04/30/2014

Description: []

Append Replace

Charge / Unit: 10.00000 /Sq Ft **Step Charges** []

Number Units: []

Debit GL: []

Credit GL: []

Bill How Often? Monthly

Ignore Fees and Charges Update?

Days Until Late: [] **Grace Days:** []

Interest Code: []

Comments: []

Append Replace

Create Step Charges

MODE: ADD RECORD

Ending: 10000.00 **Rate:** 10

Comments: []

Bill Rule Wizard Update - continued

An Update of the same Bill Rule using the Bill Rule Wizard

Step 5 – Summary

- The Summary of Requested Processing screen provides a recap of what has been entered in all the Bill Rule Wizard screens
- The user can click on Show Affected Rules for an on line display of the Agreements that will be affected.

Summary of Requested Processing

UpdateBill Rules of the following type:

Rule Category: 1RENT
 Rule Type: BUILDING
 Leasehold Type: BLDG-OTHR

Applying to the following Agreements:

Campus: AIR
 Agreement Class: ALL
 Agreement Type: ALL
 Agreement Status: ALL
 Billing Status: ALL

New Rule details:

Expiration Date: 04/30/2014
 Description : get from Leasehold Name
 Unit Charge: \$10.00
 Bill Frequency: Monthly
 Fee Upd Ovrld Flag: No
 Inc. Whole Steps: No

← [Progress Bar] →

[Show Affected Rules](#)

Candidate Bill Rules for Update

UPdate Bill Rules

Category: 1RENT Type: BUILDING Leasehold Type: BLDG-OTHR

For Agreements

Class ALL Type: ALL Agreement ALL Billing ALL Campus AIR
 Status Status

Process?	Company	Contract #	Agmt #	LH#	Eff Date	Exp Date
<input checked="" type="checkbox"/>	Central Telephone of California dba Centu...		000461	0010	04/01/2003	12/15/2011
<input checked="" type="checkbox"/>	Middleton Public Works, Building Department		000678	0001	06/01/2001	01/31/2007

Total Records: 2

[Affected Rules Report](#) [Select All](#) [DeSelect All](#) [Return](#)

Bill Rule Wizard Update - continued

An Update of the same Bill Rule using the Bill Rule Wizard

Step 5 – Summary

- The user can choose the following options from the Candidate Bill Rules for Update screen
- Run the Affected Rules Report
- Select All Agreement in list
- De-Select All in list
- Un-check a specific Agreement or Agreements

Summary of Requested Processing

UpdateBill Rules of the following type:

Rule Category: 1RENT
 Rule Type: BUILDING
 Leasehold Type: BLDG-OTHR

Applying to the following Agreements:

Campus: AIR
 Agreement Class: ALL
 Agreement Type: ALL
 Agreement Status: ALL
 Billing Status: ALL

New Rule details:

Expiration Date: 04/30/2014
 Description : get from Leasehold Name
 Unit Charge: \$10.00
 Bill Frequency: Monthly
 Fee Upd Ovrd Flag: No
 Inc. Whole Steps: No

← [Progress Bar]

Show Affected Rules



Candidate Bill Rules for Update

UPdate Bill Rules

Category: 1RENT Type: BUILDING Leasehold Type: BLDG-OTHR

For Agreements

Class ALL Type: ALL Agreement ALL Billing ALL Campus AIR
 Status Status

Process?	Company	Contract #	Agmt #	LH#	Eff Date	Exp Date
<input checked="" type="checkbox"/>	Central Telephone of California dba Centu...		000461	0010	04/01/2003	12/15/2011
<input checked="" type="checkbox"/>	Middleton Public Works, Building Department		000678	0001	06/01/2001	01/31/2007

Total Records: 2

Affected Rules Report Select All DeSelect All Return

Bill Rule Wizard Update - continued

An Update of the same Bill Rule using the Bill Rule Wizard

- The Affected Rules Report

```

Bill Rule Wizard -- Affected Bill Rules Report
*****
Wizard Action Specified: UPDATE Existing Bill Rules
Bill Rule Specification:
    Rule Category:      1RENT
    Rule Type:          BUILDING
    Bill Rule Expiration date:      04/30/2014
Leasehold Type: BLDG-OTHR

Agreement Limitations:
Campus:              AIR
Agreement Class:     ALL
Agreement Type:      ALL
Agreement Status:    ALL

NOTE: Rule Expiration Date Update to: 04/30/2014
*****
2 Bill Rules Match the specifications.
The following Agreement/Bill Rules are candidates for the specified action.

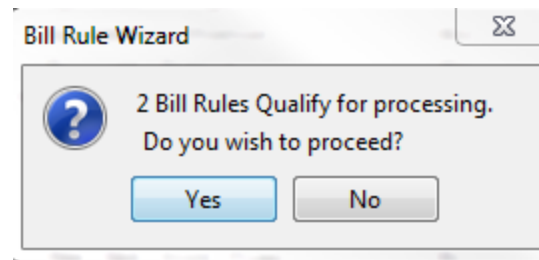
```

Company Name	Agmt #	LH#	Eff Date	Exp Date
Central Telephone of California dba CenturyLink	000461	0010	04/01/2003	12/15/2011
Middleton Public Works, Building Department	000678	0001	06/01/2001	01/31/2007

Bill Rule Wizard Update - continued

An Update of the same Bill Rule using the Bill Rule Wizard

- Click Return when finished with the Candidate Bill Rules for Update screen to return to the Summary screen.
- The last step is to Click **Finish** or **Cancel** to start over.
- If Finish is selected, the user will get one last message and click to make



Bill Rule Wizard Update - continued

An Update of the same Bill Rule using the Bill Rule Wizard

- If Yes is selected, the User Log Report generates detailing the results of the Bill Rule Wizard update

Report: LogReport

Middleton County Department of Aviation
User Log Report

Printed: 04/13/2013

Page 2 of 3

Bill Rule Wizard -- Update Rules Processing Log
Updating Bill Rules of Rule Category: 1RENT Rule Type: BUILDING
Leasehold Type: BLDG-OTHR
For Agreements of Class: ALL , Type: ALL , Status: ALL At Campus: AIR

The following rule details will be updated.

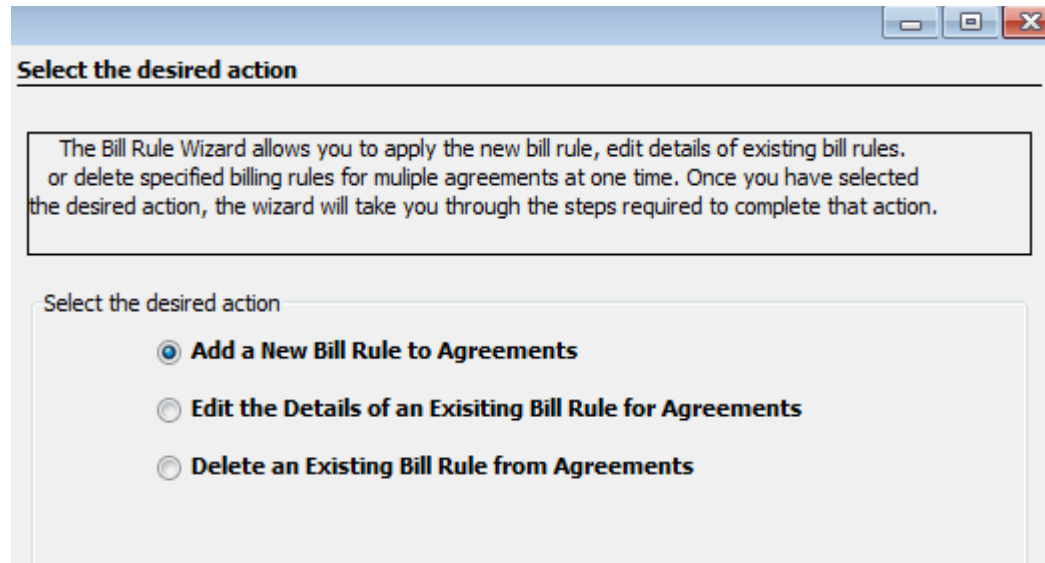
Expiration Date: 04/30/2014
Description: Use Leasehold name
Unit Charge: \$10.00
Grace Days:
Bill Frequency: M
Fee Upd Ovrld Flag: NO
Inc. Whole Steps: No

=====
Processing Summary
=====

Bill Rules Processed: 2
Bill Rules Updated: 0
Total Errors: 2

Bill Rule Wizard Add Bill Rule

The Bill Rule Wizard steps to adding a Bill Rule is much the same as Editing an Existing Bill Rule



- The different or additional steps will be detailed

Note: the Limit is not applicable and cannot be activated in the Add mode.

Bill Rule Wizard Add Bill Rule - continued

In addition to the fields available for Edit, some fields become required in the Add mode

- Effective Date
- Expiration Date
- Charge/Unit (except for At Bill Time Bill Rules)
- Number Units (only for In Definition Bill Rules)
- Debit GL
- Credit GL
- Bill How Often?

Bill Rule Wizard Add Bill Rule - continued

- Required fields are always blue

Create/Update Bill Rules

Create Bill Rules
Category: 1AVMAG **Type:** MAGAVAGMT

For Agreements
Class: ALL **Type:** ALL **Status:** ALL **Campus:** ALL

This Screen allows you to define the details of the new rules or specify the details of the existing rules that should be updated. When editing bill rule details, only fields with values entered will be updated. Others will be unchanged.

Effective Date: 04/01/2013 **Expiration Date:** 03/31/2014

Description:

Charge / Unit: 10.00000

Number Units: 1.00000

Debit GL: 1110 10-2200-xxxxxxxxxx-xxxx-520 1.70 1

Credit GL: 44XXX-2200-2200400050-XXXX-520 1.70X

Bill How Often? Monthly

Ignore Fees and Charges Update?

Days Until Late: 0 **Grace Days:** 0

Interest Code: 12 12 Percent

Comments:

Bill Rule Wizard Add Bill Rule - continued

Example of Adding Step Charges

Create/Update Bill Rules

Ending	Rate
1000000.0	0.1
2000000.0	0.15
3000000.0	0.2

Increment Whole Steps? Yes No

Create Step Charges

MODE: ADD RECORD

Ending: Rate:

Comments:

Ending	Rate
1000000.0	0.1
2000000.0	0.15
3000000.0	0.2
4000000.0	0.25

Bill Rule Wizard Add Bill Rule - continued

Example of Applying Bill Rules

- An additional Step will
- appear in the Steps – Set
- Rule Relations
- The Rule being added is
- “applied” to the Bill Rules
- one by one as needed

Steps

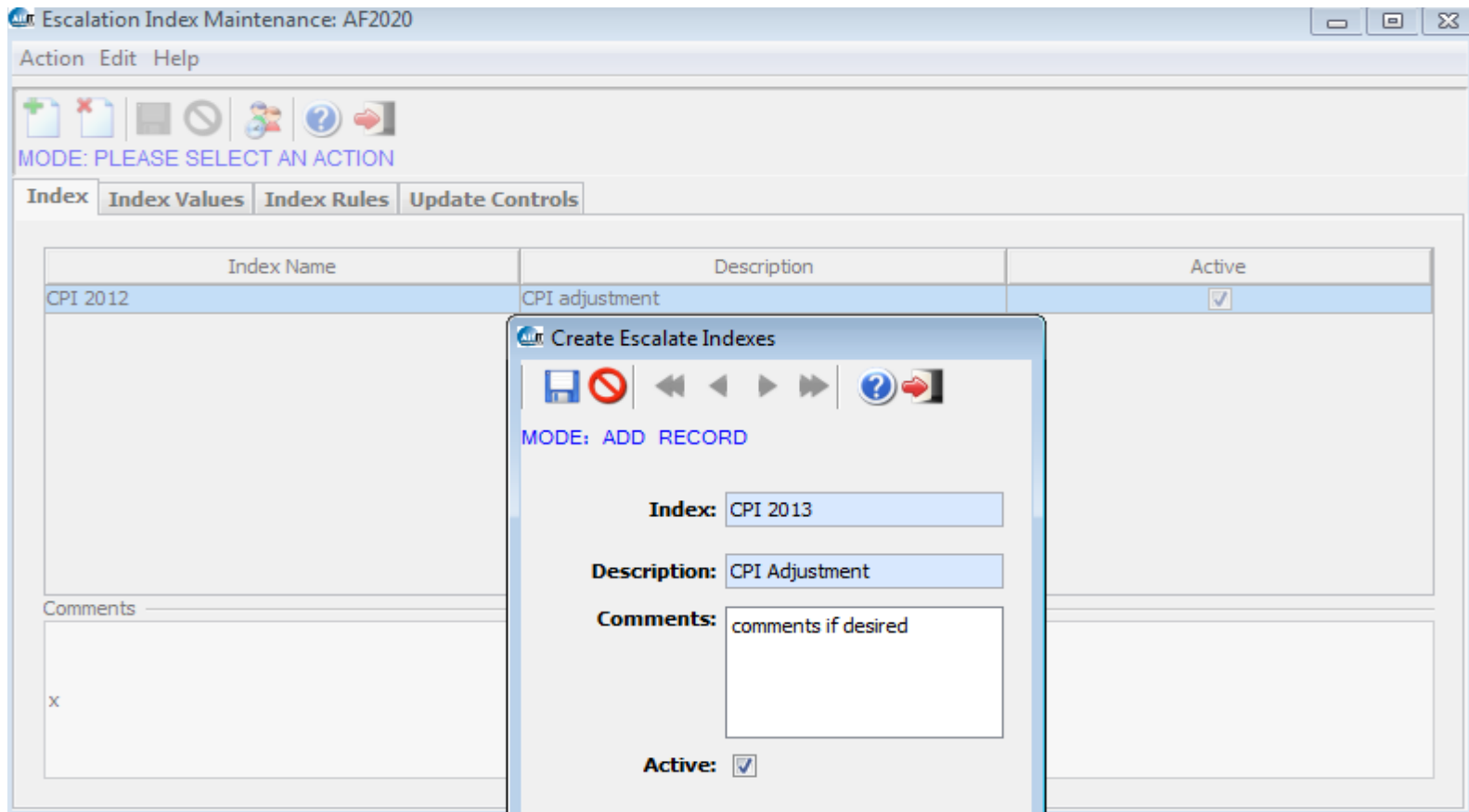
1. Select the desired action
2. Specify Bill Rule to be Processed
3. Limit Agreements to be Processed
- 4. Create/Update Bill Rules**
- 5. Set Rule Relations**
6. Summary

Set Rule Relations

Rule Category	Rule Type	Lhld Type	Prd Category	Prd Type
<div style="border: 1px solid #0070c0; padding: 5px;"> <p>Create Rule Relations</p> <p>MODE: ADD RECORD</p> <p>Rule Relations</p> <p>Rule Category: 1AVMAG 1AVMAG</p> <p>Rule Type: MAGAVAGMT MAGAVAGMT</p> <p style="color: #0070c0;">Applies to: Agreement</p> </div>				

Escalation Index Maintenance

- Create an Index Name, Description and set to Active



The screenshot shows the 'Escalation Index Maintenance: AF2020' application window. The main interface has a menu bar (Action, Edit, Help) and a toolbar with icons for file operations and help. Below the toolbar, it says 'MODE: PLEASE SELECT AN ACTION'. There are four tabs: 'Index', 'Index Values', 'Index Rules', and 'Update Controls'. The 'Index' tab is active, displaying a table with the following data:

Index Name	Description	Active
CPI 2012	CPI adjustment	<input checked="" type="checkbox"/>

Below the table is a 'Comments' section with a text area containing 'x'. A modal dialog box titled 'Create Escalate Indexes' is open in the foreground. It has a toolbar with icons for save, delete, and navigation. The dialog shows 'MODE: ADD RECORD' and the following fields:

- Index:** CPI 2013
- Description:** CPI Adjustment
- Comments:** comments if desired
- Active:**

Escalation Index Maintenance - continued

- Set Index Values

Escalation Index Maintenance: AF2020

Action Edit Help

MODE: PLEASE SELECT AN ACTION

Index Index Values Index Rules Update Controls

Index: CPI 2012 CPI adjustment

Index Date	Index Value (%)	Escalated	Comments
03/26/2012	2.5	<input checked="" type="checkbox"/>	
04/13/2013	2.75	<input type="checkbox"/>	

Edit Escalate Index Values

MODE: VIEW / EDIT RECORD

Index Date: 04/13/2013

Index Value (%): 2.7500000000000000

Comments:

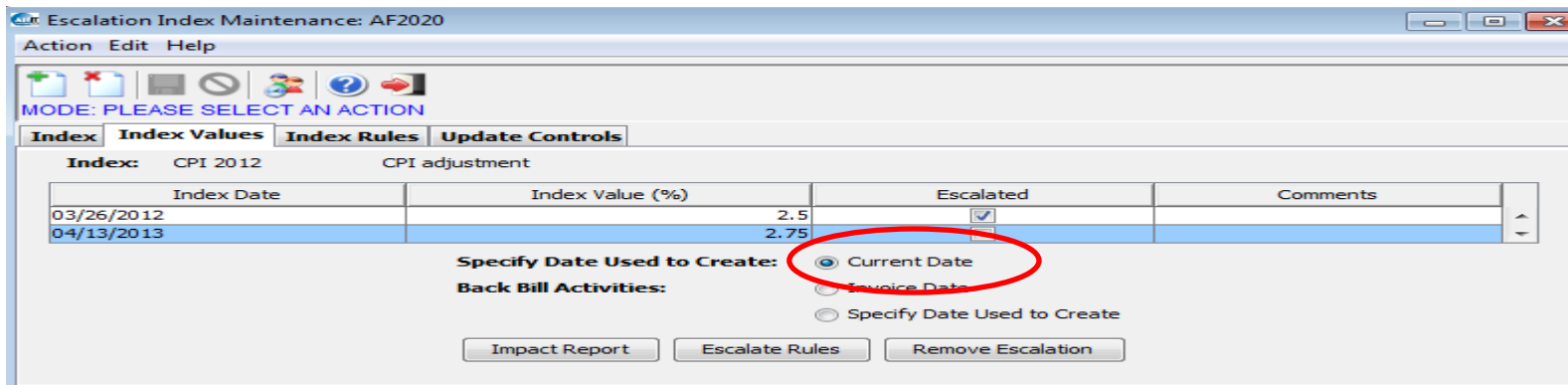
Specify Date Used to Create: Current Date
 Invoice Date
 Specify Date Used to Create

Back Bill Activities:

Impact Report Escalate Rules Remove Escalation

Escalation Index Maintenance - continued

- Specify Date Used to Create Current Date



Escalation Index Maintenance: AF2020

MODE: PLEASE SELECT AN ACTION

Index Index Values Index Rules Update Controls

Index: CPI 2012 CPI adjustment

Index Date	Index Value (%)	Escalated	Comments
03/26/2012	2.5	<input checked="" type="checkbox"/>	
04/13/2013	2.75	<input type="checkbox"/>	

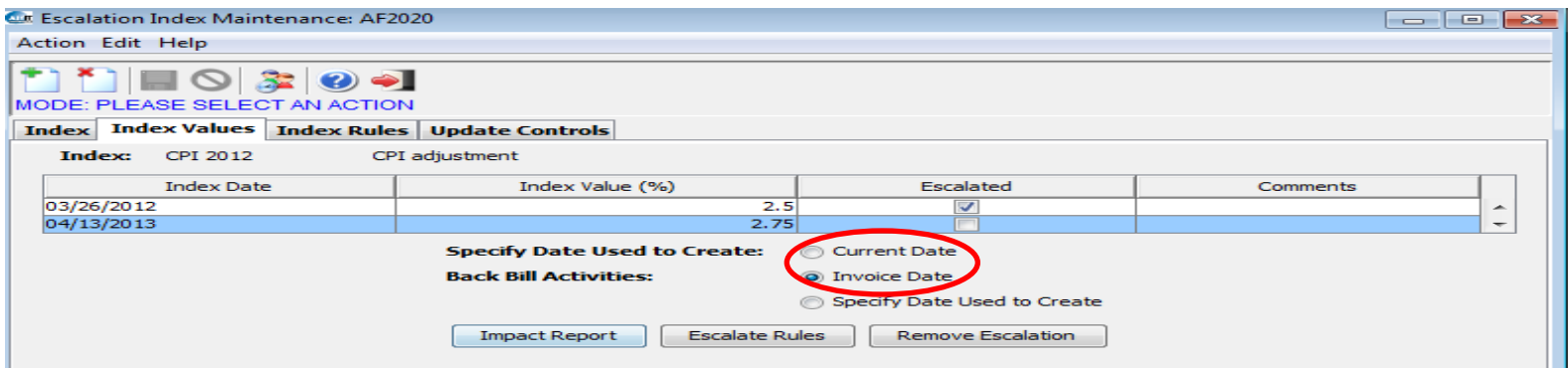
Specify Date Used to Create: Current Date

Back Bill Activities: Invoice Date

Specify Date Used to Create

Impact Report Escalate Rules Remove Escalation

Invoice Date



Escalation Index Maintenance: AF2020

MODE: PLEASE SELECT AN ACTION

Index Index Values Index Rules Update Controls

Index: CPI 2012 CPI adjustment

Index Date	Index Value (%)	Escalated	Comments
03/26/2012	2.5	<input checked="" type="checkbox"/>	
04/13/2013	2.75	<input type="checkbox"/>	

Specify Date Used to Create: Current Date

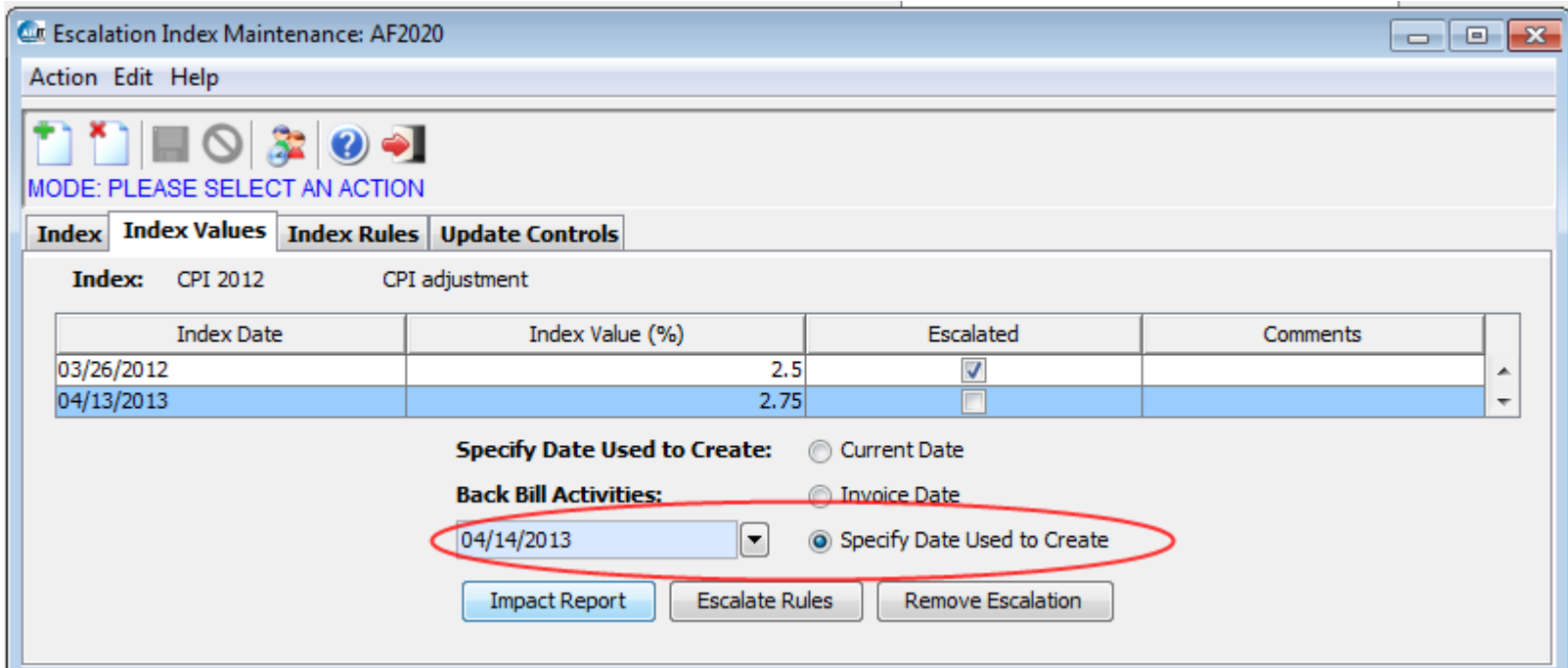
Back Bill Activities: Invoice Date

Specify Date Used to Create

Impact Report Escalate Rules Remove Escalation

Escalation Index Maintenance - continued

- Specify Date Used to Create
- Specify Date Used to Create



Escalation Index Maintenance: AF2020

Action Edit Help

MODE: PLEASE SELECT AN ACTION

Index Index Values Index Rules Update Controls

Index: CPI 2012 CPI adjustment

Index Date	Index Value (%)	Escalated	Comments
03/26/2012	2.5	<input checked="" type="checkbox"/>	
04/13/2013	2.75	<input type="checkbox"/>	

Specify Date Used to Create: Current Date

Back Bill Activities: Invoice Date

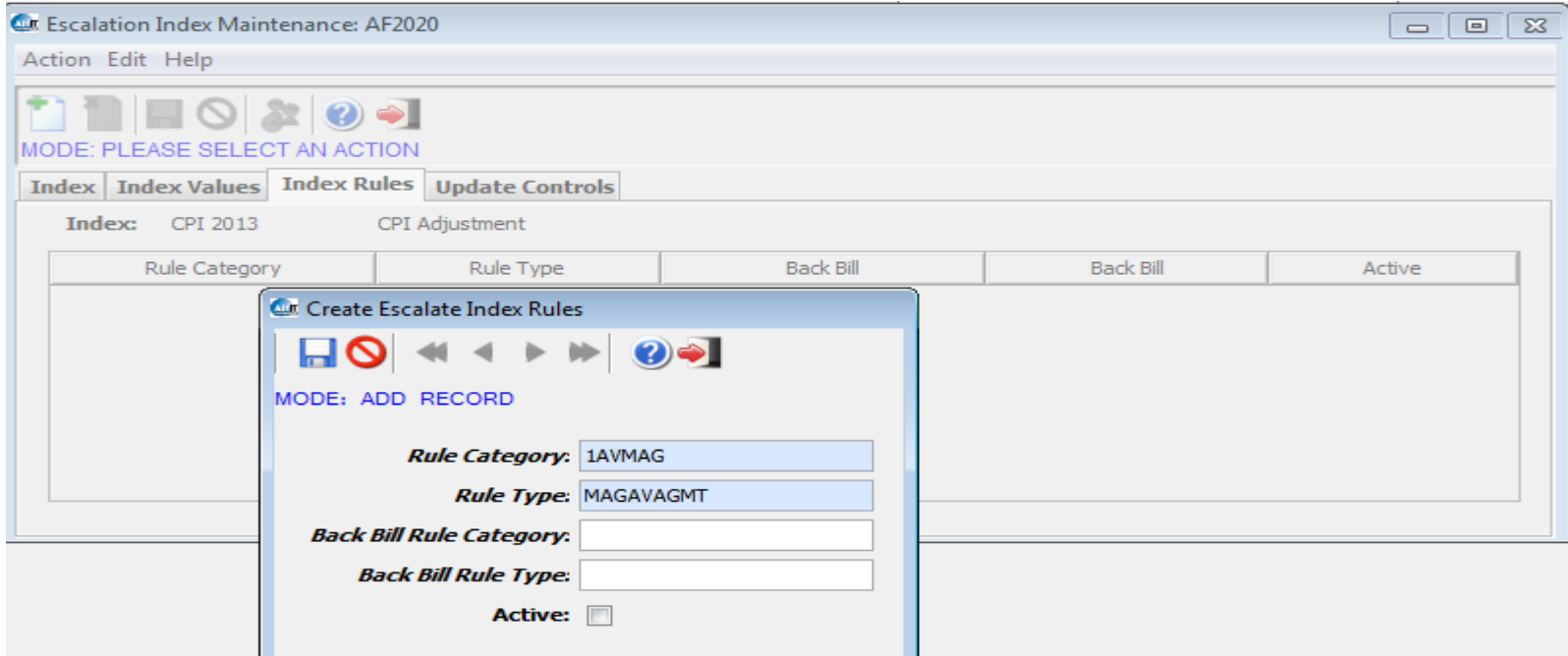
Specify Date Used to Create

04/14/2013

Impact Report Escalate Rules Remove Escalation

Escalation Index Maintenance - continued

- Select the Bill Rule Category and Bill Rule Type to be Updated
- Add all Bill Rules to be included in the Update

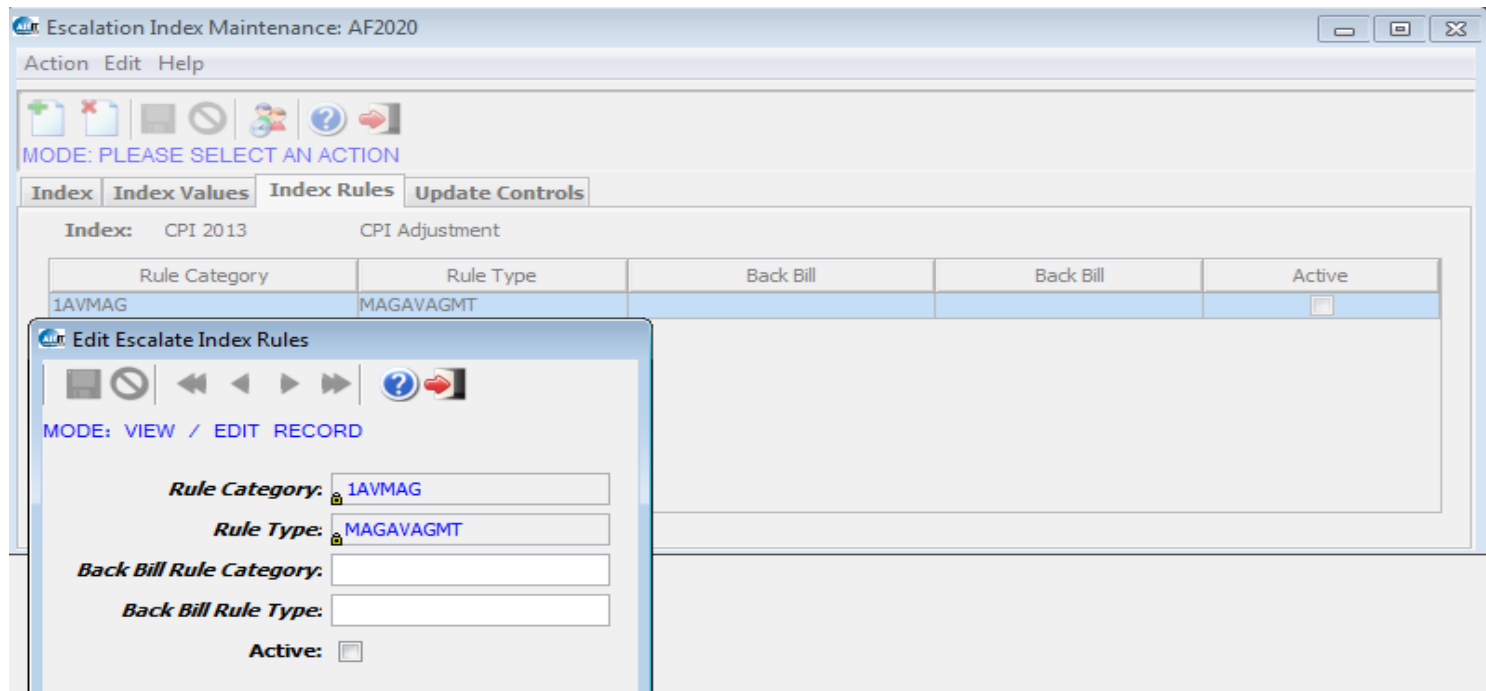


The screenshot displays the 'Escalation Index Maintenance: AF2020' application window. The main window has a menu bar (Action, Edit, Help) and a toolbar with icons for file operations and help. Below the toolbar, it says 'MODE: PLEASE SELECT AN ACTION'. There are four tabs: 'Index', 'Index Values', 'Index Rules', and 'Update Controls'. The 'Index' tab is active, showing 'Index: CPI 2013' and 'CPI Adjustment'. A table with columns 'Rule Category', 'Rule Type', 'Back Bill', 'Back Bill', and 'Active' is visible but empty. A 'Create Escalate Index Rules' dialog box is open in the foreground, showing 'MODE: ADD RECORD'. The dialog has a toolbar with icons for save, delete, and navigation. It contains the following fields:

- Rule Category:** 1AVMAG
- Rule Type:** MAGAVAGMT
- Back Bill Rule Category:** (empty)
- Back Bill Rule Type:** (empty)
- Active:**

Escalation Index Maintenance - continued

- Select the Bill Rule Category and Bill Rule Type to be used if Back Billing is desired
- Set to Active

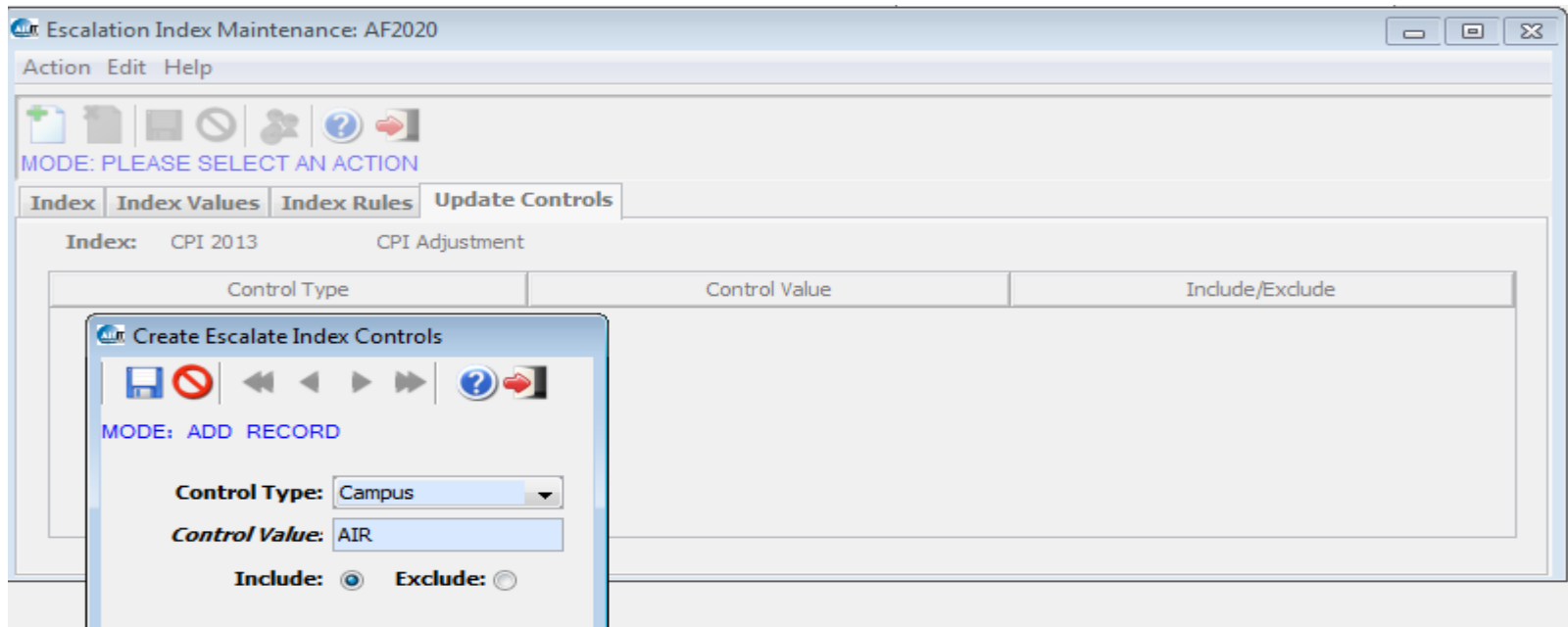


The screenshot shows the 'Escalation Index Maintenance: AF2020' application window. The main window has a menu bar (Action, Edit, Help) and a toolbar with icons for file operations, help, and navigation. Below the toolbar, it says 'MODE: PLEASE SELECT AN ACTION'. There are four tabs: 'Index', 'Index Values', 'Index Rules', and 'Update Controls'. The 'Index Rules' tab is active, showing a table with columns: Rule Category, Rule Type, Back Bill, Back Bill, and Active. The table contains one row with values: 1AVMAG, MAGAVAGMT, (blank), (blank), and an unchecked checkbox. An 'Edit Escalate Index Rules' dialog box is open in the foreground, showing the same data as the table row. The dialog has a toolbar with navigation icons and says 'MODE: VIEW / EDIT RECORD'. The fields in the dialog are: Rule Category: 1AVMAG, Rule Type: MAGAVAGMT, Back Bill Rule Category: (blank), Back Bill Rule Type: (blank), and Active: (unchecked checkbox).

Rule Category	Rule Type	Back Bill	Back Bill	Active
1AVMAG	MAGAVAGMT			<input type="checkbox"/>

Escalation Index Maintenance - continued

- Set Update Controls to Include or Exclude the following:
 - Campus
 - Agreement Class/Agreement Type
 - Agreement Number
- Select Include or Exclude



Escalation Index Maintenance - continued

- Run Impact Report

Report: AR0020

Middleton County Department of Aviation

Printed: 04/14/2013

Escalated Rule Impact Report

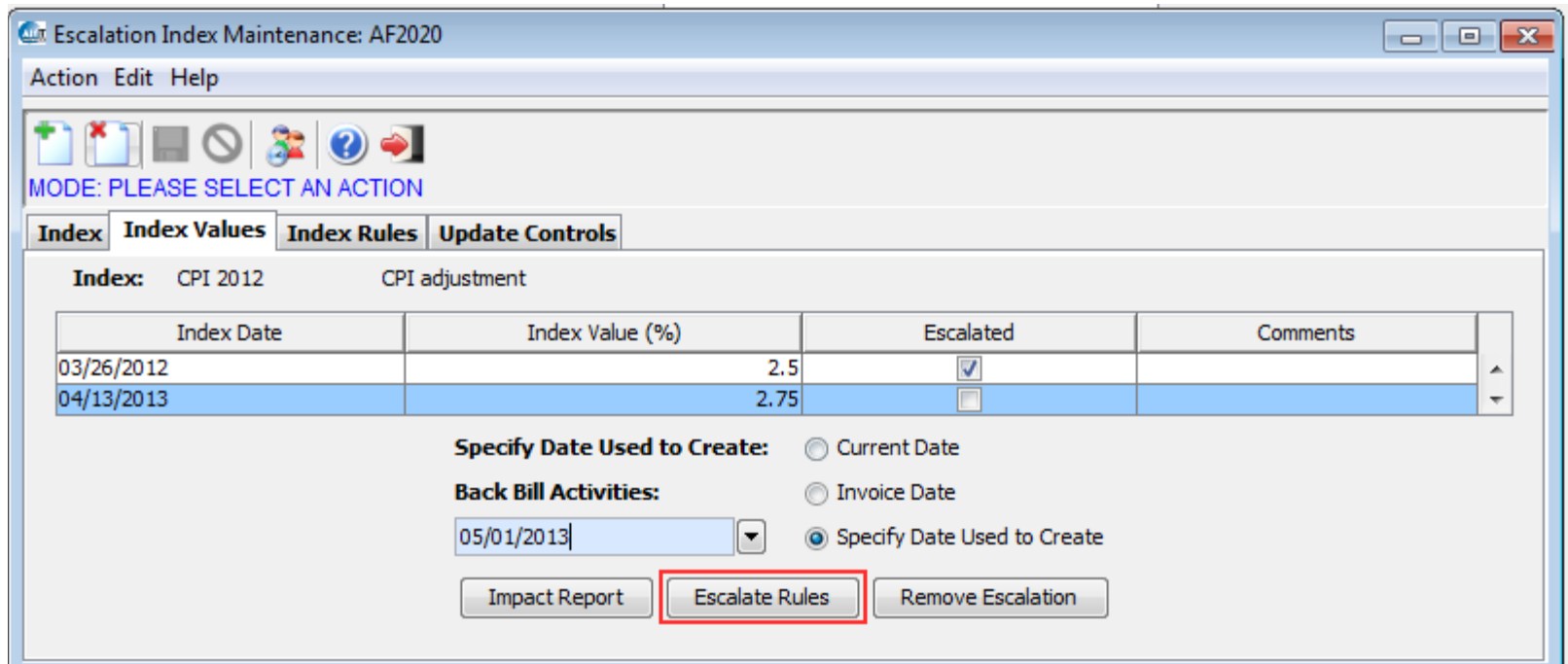
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Agreement	Company	Contract	Effective	Expires				
000341	Vanguard Car Rental USA, Inc. ATTN: Accounts Payable Enterprise Rent-A-Car c/o Vanguard Car Rental Group 8290 Anville St. Orlando, FL US 89139		02/17/2004	04/03/2017				
Rule Category	Rule Type	Other Information	New Rate Date	Existing Unit Charge	New Unit Charge	Change	Unadjusted Billings	Adjustment Amt
1MAG	MAG AGMT		04/14/2013	5,503,686	5,655,037.36500	151,351.36500	0	0.00000
Total Impact for Agreement 000341						151,351.36500		0.00000

Agreement	Company	Contract	Effective	Expires				
000381	Avis Rent A Car System, LLC ATTN: RAC Accounting Dept. 6 Sylvan Way Parsippany, NJ US 07054		02/17/2004	04/03/2017				
Rule Category	Rule Type	Other Information	New Rate Date	Existing Unit Charge	New Unit Charge	Change	Unadjusted Billings	Adjustment Amt
1MAG	MAG AGMT		04/14/2013	2,542,667.94	2,612,591.30835	69,923.36835	0	0.00000
Total Impact for Agreement 000381						69,923.36835		0.00000

Escalation Index Maintenance - continued

- Looks Good - Escalate Rules



Escalation Index Maintenance: AF2020

Action Edit Help

MODE: PLEASE SELECT AN ACTION

Index Index Values Index Rules Update Controls

Index: CPI 2012 CPI adjustment

Index Date	Index Value (%)	Escalated	Comments
03/26/2012	2.5	<input checked="" type="checkbox"/>	
04/13/2013	2.75	<input type="checkbox"/>	

Specify Date Used to Create: Current Date Invoice Date Specify Date Used to Create

Back Bill Activities: Invoice Date Specify Date Used to Create

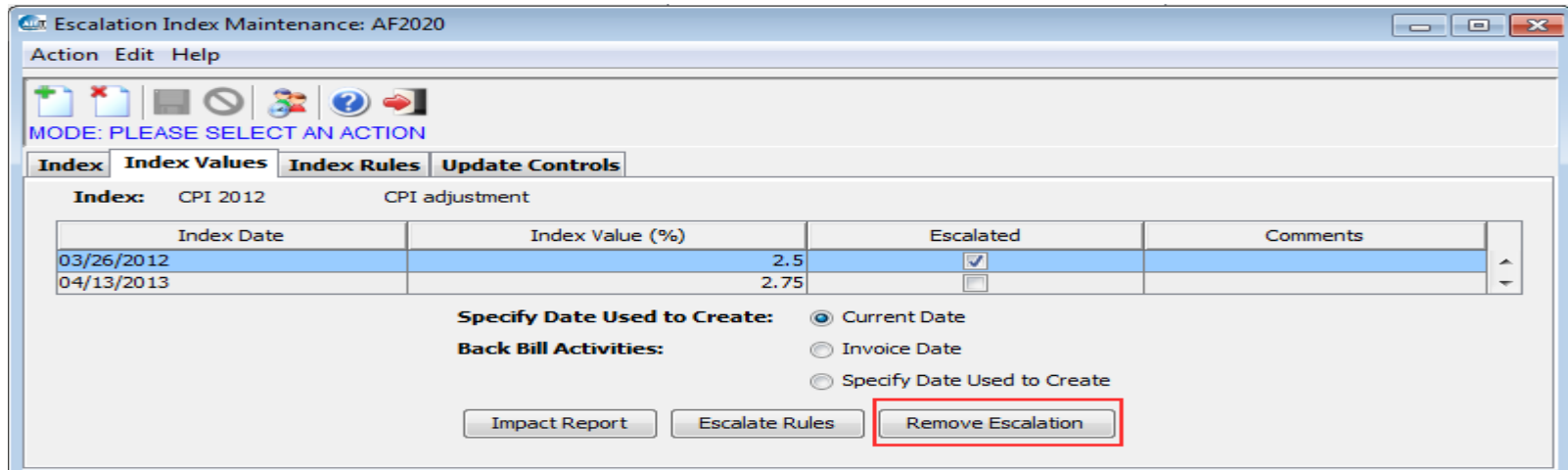
05/01/2013

Impact Report Escalate Rules Remove Escalation

Escalation Index Maintenance - continued

Oops! What was I thinking????

- Remove Escalation - this is the act of reversing an escalation that has taken place.



Index Date	Index Value (%)	Escalated	Comments
03/26/2012	2.5	<input checked="" type="checkbox"/>	
04/13/2013	2.75	<input type="checkbox"/>	

Specify Date Used to Create: Current Date
 Invoice Date
 Specify Date Used to Create

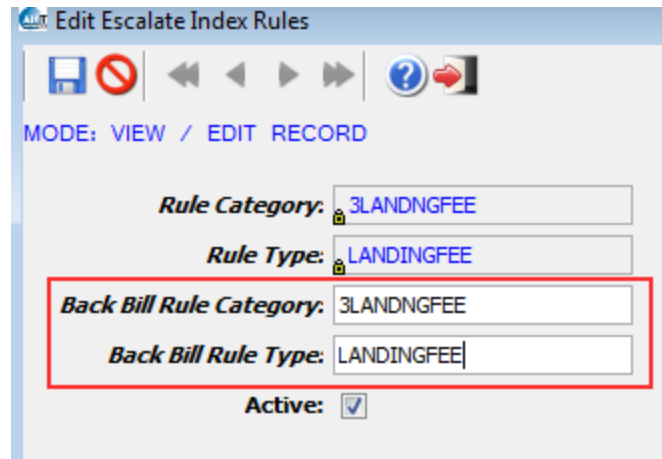
Back Bill Activities:

Impact Report Escalate Rules **Remove Escalation**

- Remove Escalation Button** - this button is only available if the "Active" checkbox on the Indexes tab that corresponds with this index is checked and the Escalated checkbox on this screen has a checkmark in it.
- When pressed, this button invokes the process of removing the escalation that has been done for this index and date combination.

Escalation Index Maintenance - continued

- Back Bill
- The system will back bill the difference between the old and new rate if the Bill Rule Category and Type have been set up for back billing. Back Billing will occur the next time the Invoice Type associated with the specified Bill Rule Category and Type for Back Billing is generated.



Edit Escalate Index Rules

MODE: VIEW / EDIT RECORD

Rule Category: 3LANDNGFEE

Rule Type: LANDINGFEE

Back Bill Rule Category: 3LANDNGFEE

Back Bill Rule Type: LANDINGFEE

Active:

In the example above, it is the same Bill Rule Category and Type that has been escalated. There may be specific rules for adjustments used at your site.