Bill Rule Detail: AF2300 - PW8 Preliminary Design

3. Select Yes to allow updates by the Bill Rule Wizard and No to lock the Bill Rule from " auto" updates. Does the same as the previous "Ignore Fees and Charges Updates" Checkbox.

5. NEW FIELD: Allows selection of a "FIN" Bill rule, in the open agreement or another " Shared/Master" agreement, available to all agreements for the Campus. Selecting the Late Fee Rule here eliminates the step of first creating a Late Fee rule in every agreement, then associating it with all the bill rules needed in that agreement. If more than one late fee is to be applied to the same charge, it can be done in the "old" way.

6. "MODE" color more distinct. Screen automatically opens in Edit Mode from the Bill Rule Summary (Matrix display) screen

7. Displays the number of records in Bill Rule History for this BR

8. NEW FIELD: The "Real" financial Cost center. This is obtained frm the Leasehold, if the rule is at a leasehold level, or entered from a drop-down list of Campus cost center values. The value is used to validate the Campus segment of the Credit GL code on "Save", or replaces the masking of the Cost Center segment. The intent is to make GL code selection more reliable and easier, as the Cost Center segment is the most likely to vary and be masked in the Rule Type set up.

9. Now allows the Amendment Type desc to display.

10. The Invoice Type is displayed. The Prefix (Probably 3-Char) will be shared by the Invoice Type and Rule Category. When a Rule CAtegory is created it will automatically inherit the Invoice Type prefix and be assigned to the Invoice type. The scenarios where the same Rule Category can be assigned to multiple Invoice Types will not be allowed

11. NEW FIELD: The "Rate Code" is inherited from the Leasehold Rate Code (Formerly Leasehold Type), or entered from a drop down if the rule is not at a leasehold level. The Rate Code is now linked to a Rate Table, and in this case the Rule Category has a new "Rate Source" - "From Table". This allows set ups where Leaseholds and/or Bill Rules with a common "Global Rate" can get their "rate" for the BWA generation from a table that includes effective periods by Rate Code - eliminating the need for manual rate updating processes. Future rates can also be used to support revenue budget processes

12. NEW FIELD: "Tax Rule" is an example of a commonly used type of "Other Rule" which may be selected to apply to this Bill Rule. Various potential options are available

13. Reflects the use of the "From Table" rate source option

14. Describes where the text is ultimately displayed