Billing Module

Gimmal Physical

Contents

Version History

Version	Approved By	Effective Date	Product Version	Description of Change
1	Terry Butler	03/01/2022	3.11	Created for Gimmal Version 3.11
2	Marta Farensbach	12/1/2022	3.12	Minor updates for Gimmal Physical 3.12

Configure Billing

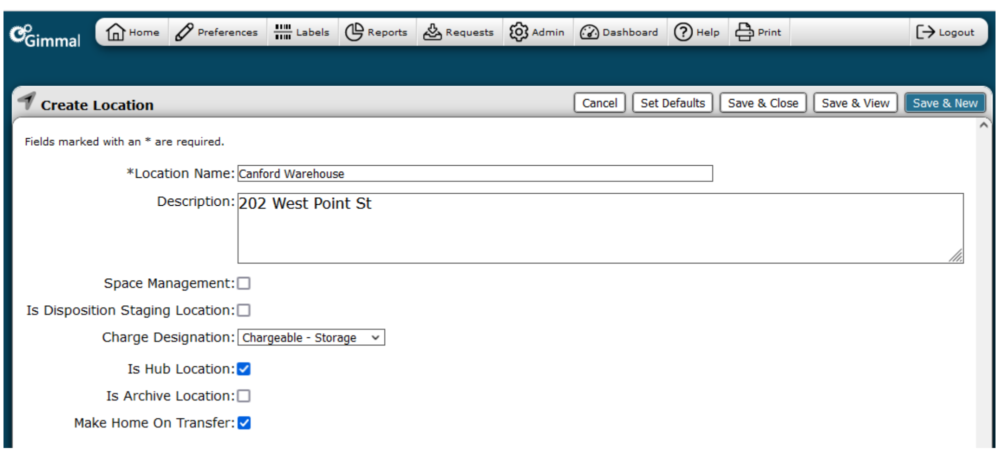
Storage Costs

To configure billing for storage cost, information needs to be entered on several different tabs in Infolinx.

1. **Locations** – The "Hub Location" checkbox must be selected for any Location where costs will accrue for Box storage. Additionally, the "Charge Designation" list will need to be set to a value of "Chargeable – Storage." When these properties are set, a Box transferred to one of these Locations or to a Shelf in one of these Locations will have its "Accession" field set to true and its "Accession Date" field updated to the current date. An item is only accessioned once.
2. **Shelves** – The "Current Location" of Shelf records needs to be one of the Locations where the "Hub Location" checkbox has been selected and the "Charge Designation" list value has been set to "Chargeable – Storage." When these properties are set, a Box transferred to one of these Shelves will have its "Accession" field set to true and its "Accession Date" field updated to the current date. An item is only accessioned once.
3. **Boxes** – If the "Current Location" of a Box is either a Shelf or a Location as designated above for any time during the billing period, storage costs will accrue. Additionally, setting the "Box Size" for Box records will allow for different amounts to be charged based on the size of the Box.

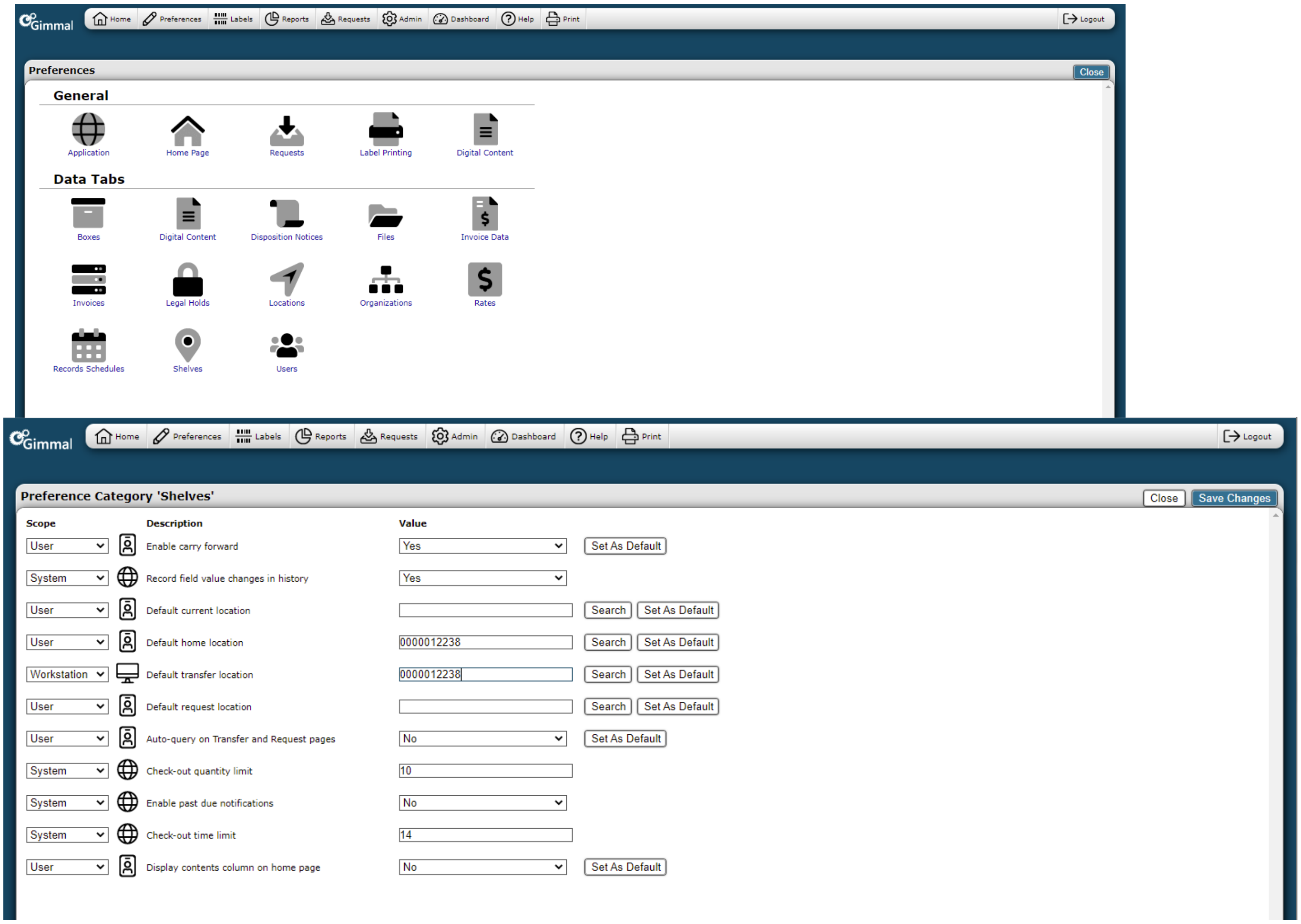
Create Locations

1. Click on the Locations tab.
2. Click on the Create action button.
3. Enter metadata for the Location, being sure to check the "Is Hub Location" checkbox and select "Chargeable – Storage" from the "Charge Designation" list.
4. Click Save & Close.

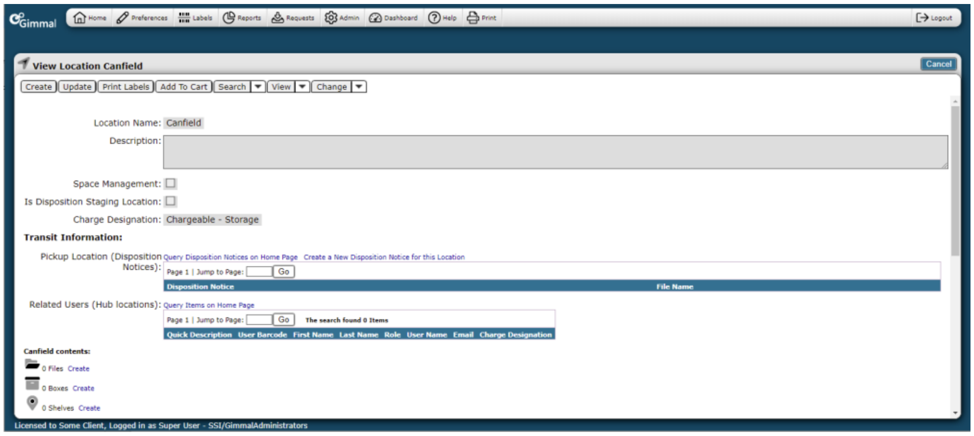


Create Shelves

1. Import Shelf data (see importing data documentation).
2. Create Shelf data from the Shelves tab.
    a. Verify Preference settings in the Shelves category on the Preferences page. The "Default current location" and the "Default home location" should be set to the barcode of a Hub Location that has been designated as a "Chargeable – Storage" Location.



    b. Click on the Shelves tab.
    c. Click on the Create action button.
    d. Enter metadata for the Shelf record, being sure to select "Chargeable Storage" from the "Charge Designation" list.
    e. Save the Shelf record.
    f. Verify the Shelf record was created in the specified Location.
3. Create Shelf data from the View Location page.
    a. Go to the View page for the Location where the Shelves will be placed.
    b. Click on the Create link next to the Shelf icon near the bottom of the page.

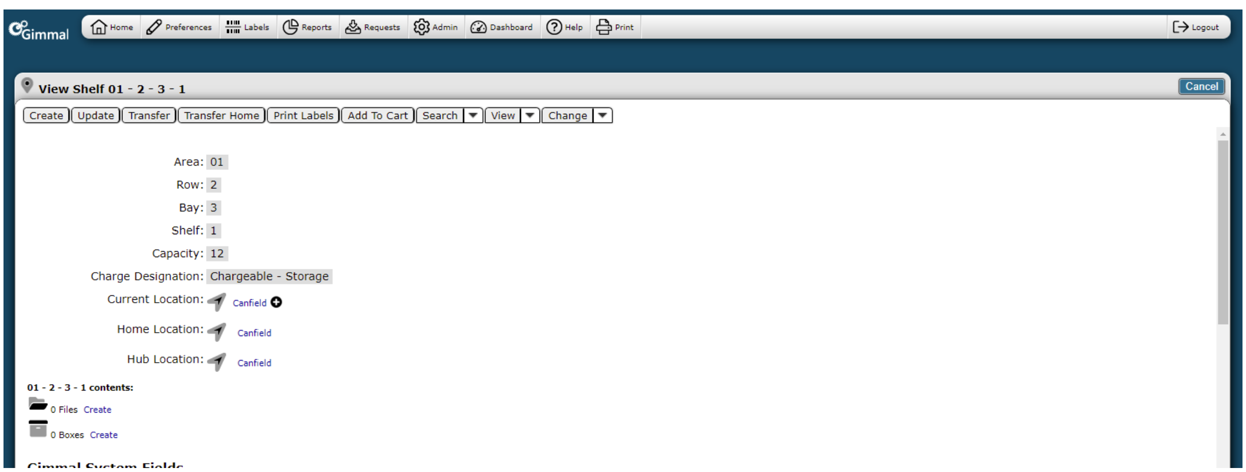


c. Enter metadata for the Shelf record, being sure to select “Chargeable Storage” from the “Charge Designation” list.

d. Save the Shelf record.

Create Boxes

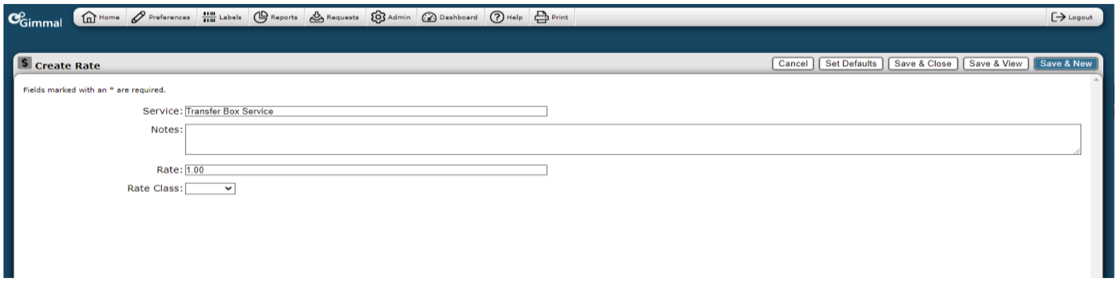
1. Import Box data (see importing data documentation).
2. Create Box data from the Shelf view page.
    a. Go to the View page for the Shelf where the Boxes will be placed.
    b. Click on the Create link next to the Box icon near the bottom of the page.



    c. Enter metadata for the Box record, being sure to select a “Box Size” value.
    d. Save the Box record.

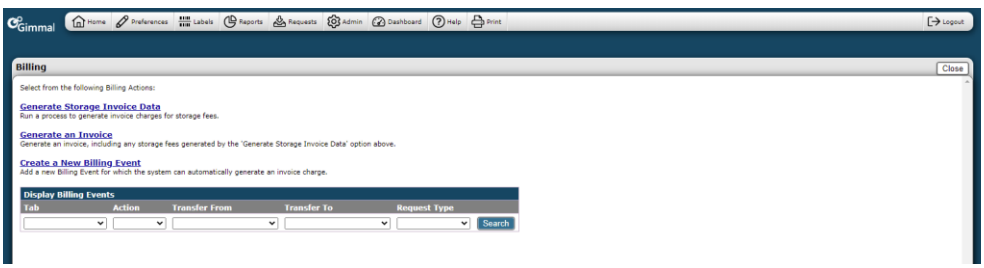
Create Rates

1. Click on the Rates tab and click the Create action button.
2. Enter data for the available fields.
3. Click on any of the available Save action buttons to save the Rate.



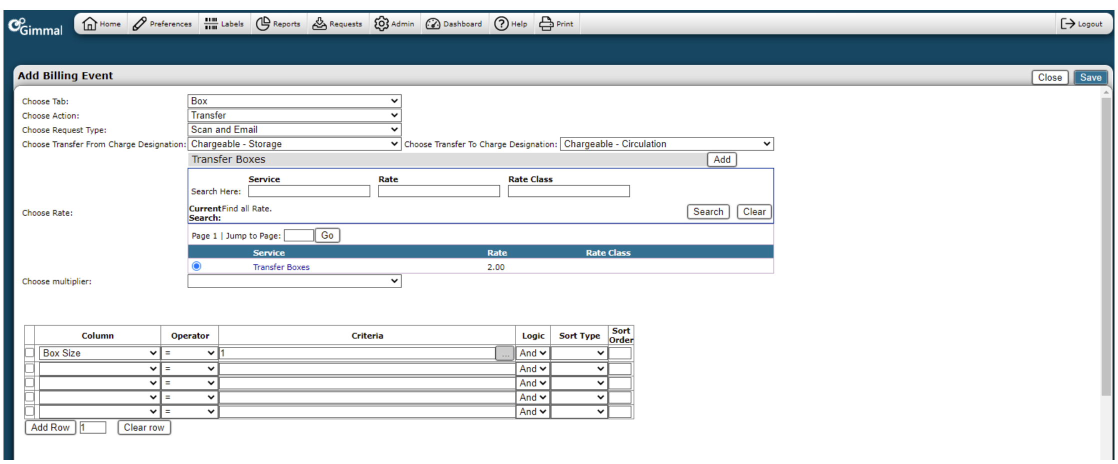
View the Billing Management Page

1. Click "Admin" in the top navigation menu.
2. Under the Configuration section, click "Billing Management."
3. To view existing Billing Events, click on the Search button.



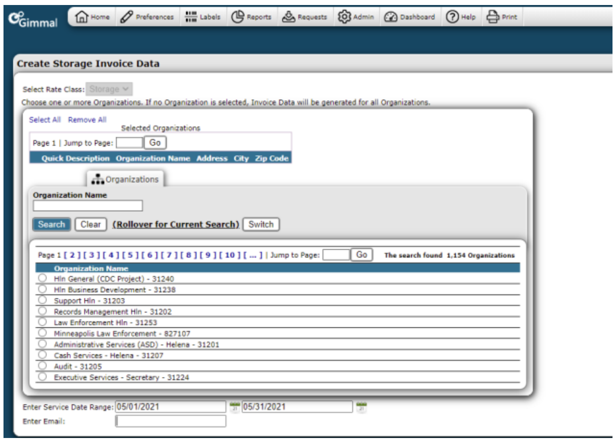
Create Billing Events

4. Click on the “Create a New Billing Event” link.
5. Select the tab.
6. Select the action.
    a. Accession – This occurs when an item is transferred to a hub location for the first time.
    b. Create – This occurs when an item is created.
    c. Delete – This occurs when an item is deleted.
    d. Delivery- This occurs when items are transferred from a hub location with a portable scanner.
    e. Storage – This is used to charge for the storage of items.
    f. Transfer – This occurs when items are transferred between records with specified “Charge Designations”.
        i. Request Type can also be a cost factor when setting up Transfer rates.
        ii. “Transfer From” and “Transfer To” Charge Designations will also need to be set.
    g. Update – This occurs when items are updated.
7. Choose a Rate from the list or click on the Add button to add a new Rate for this action.
8. Select a multiplier (optional). Any fields that are defined as integer fields will be displayed in this list.
9. Add logic to filter which items will receive this charge (optional).
10. Click the Save button.
11. When any of the configured actions occur in the application, records will be created on the Invoice Data tab.



Generating Storage Invoice Data

1. After creating a Billing Event with an action of Storage, click on the “Generate Storage Invoice Data” link.
2. Select Organization records or generate storage invoice data for all Organizations.
3. Enter values for “Service Date Range”. [Note: Infolinx will automatically display “Service Date Range” for the month prior to today’s calendar date. The date fields can be overwritten.] Enter “Email Address” (to be notified when the process is complete).
4. Click Create.
5. Items that have been stored at any of the configured storage Locations will have records created for them on the Invoice Data tab.



Generating Invoices

1. Click on the “Generate an Invoice” link.
2. Select Organization records or do not select in order to generate invoices for all Organizations.
3. Enter a “Service Date Range.” [Note: Infolinx will automatically display “Service Date Range” for the month prior to today’s calendar date. The date fields can be overwritten.]
4. Click the Create button.
5. Records will be created on the Invoice Data tab. Invoices will also be generated and displayed on the Invoices tab.