Billing Process Overview

The billing process involves all steps required to complete billing and accounts receivable activity. This includes deciding to sell and extend credit, collecting information on the sale and the customer, entering the bill, delivering the invoice, and collecting and posting payment.

**Sale**
An external customer contacts a University department* to purchase goods or services.
*Departments must be authorized to engage in sales activity.

**Customer**
The University department determines credit risk.
(Departments absorb cost/expense if customer does not pay.)

**Billing (Invoice)**
Sale occurs, and goods or services are delivered to the customer.
(Department)

**Accounts Receivable (Payment)**
University department collects information on the sale and customer. Information is given to the billing specialist.
(Billing Initiator)

Prior to billing, the customer record is verified/updeated/created.
(Billing Specialist)

A bill is entered into EFS capturing details of the sale.
(Billing Specialist)

The bill automatically converts into an invoice overnight.
(System)

Invoice is delivered via email or mail based on customer preference as recorded on the customer record.
(Accounts Receivable Services)

If payment is NOT received, AR Services follows up with customer to collect past due amounts.
(Accounts Receivable Services)

Payment details are uploaded into EFS and applied to the invoice.
(System)

**Outside EFS**

**Within EFS**

Outside EFS

Within EFS