Process Billing

Utilize these instructions to process billing in SwyftOps

- Click Billing from the left-hand side menu, then click "Process".

- Set the proper parameters and date range for billing cycle.
  - Use the "Billing Period" drop down to select the proper parameters.
  - Click in the box next to start, a calendar appears, select the start and end dates.
  - Set the "Invoice Date" that needs to populate on the invoices.
  - Click green arrow.

- Discounts
  - If you have not set any discounts for the clients, you can enter them here.
  - If you have set a discount under the client's billing page in SwyftOps it will populate here.
  - Click green arrow.

- Message
  - Enter a message that will appear on all invoices.
  - A default message is populated automatically, this can be removed or changed.
  - Click green arrow.

- Click the blue "Process" bar.
  - Warning box will appear – click yes to continue and run billing.
  - If No is clicked, it will return to the page waiting for "Process" to be clicked.
  - When complete – there will be a message that states success.

- Click "Billing" from the left-hand side menu.
  - The completed billing cycle is now listed.
  - Click the email icon to select which clients to email their invoice.
  - For EDI claims, click the "certificate" icon next to the envelope.

- Billing reporting is available under the "Reports" area of SwyftOps.

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