



## Tenant/Resident Billing

Tenant/Resident Billing is an ideal application for hotels, assisted living facilities, universities, hospitals, and any other situation where phone system usage costs need to be captured and reallocated. Layered with Tenant/Resident Billing is our premier call accounting solution, Call SWEET! Create and schedule reports on top of taking care of your billing needs.

The Tenant/Resident Billing application allows users to create custom calling plans to best fit their organization's needs. Design anything from a limited plan covering only local calls to an extended plan with unlimited local and long distance within the U.S. or something in between such as a pay-as-you-go plan with a predetermined rate/minute. The possibilities are endless! If your business has other billing systems, Tenant/Resident Billing can create files of the transaction records to export to those systems.



### Key Features and Benefits

**Limitless calling plan choices** - Many aspects of the calling plans are customizable, from user-defined initial call charges to long distance rates. If you have multiple sites with resident billing, plans can be created for each specific site.

**Recover telephone costs** - Whether you choose to simply recover costs or profit through markups, it's all under your control. You are empowered with the ability to add surcharges such as state and federal taxes, markups on standard rates, or fixed costs such as equipment charges. Either fixed or percentage-based charges are possible.

**Flexible split billing capabilities** - A bill can be generated for the dates and times you need, from an entire month or a given period of time within a single day. This gives you flexibility to bill tenants, guests, or patients when needed.

- Bills can be created for different accounts from the same extension, convenient for hotels and other situations where multiple accounts will use the same extension within a month

**Easily generate telephone bills** - Bills in the form of either printed hard copies or electronic are produced effortlessly in an easy to understand format.

- Bill all tenants/residents at one time, by groups, or individually
- Create billing schedules

# Tenant/Resident Billing Application Overview

Create calling plans with endless billing options. Day, evening and night time periods are defined by the user to best fit the business' schedule. Initial charges and subsequent time interval charges for incoming, long distance, toll free and local calls are also user-defined and can be customized for each period of the day. Local numbers are specified by simply entering in the local area code/exchange. If the company has multiple sites with resident billing, plans can be customized for each specific site.

The screenshot shows the 'Configure Billing Plans' interface. At the top, it displays 'Home > Resident Billing Admin > Billing Plans' and the date 'Thursday, March 27, 2008 - Logout'. Below this, there are dropdown menus for 'Select Site: 1 - ResBill Site #1' and 'Select Plan: 1 - Local Plan 1'. The main configuration area includes sections for 'Day Period', 'Evening Period', 'Night Period', and 'Intervals'. A table for 'Period Times' shows 8:00 AM, 6:00 PM, and 11:00 PM. Below that is a table for 'Incoming', 'Long Dist', 'Toll-Free', and 'Local' charges, with columns for 'Init.' and 'Sub.' charges. At the bottom, there is a 'Save' button and a 'Cancel' button. A secondary section titled 'Setup Local Dialing' contains a table with columns for 'Local NPA', 'Local NXX', 'Site Code', 'Day First', 'Evening First', and 'Night First'. The table lists 10 rows of data for NPA 412 and NXXs 204 through 363, all with a Site Code of 1 and a charge of \$0.07. A footer note says '© 2006 DATEL Software Solutions'.

Resident/tenant information such as name and extension, as well as check in/out dates and other details are found in the Billing Stations section of Tenant/Resident Billing. Choose which billing plan should be applied to each individual account and set equipment fees. The user can view open, active accounts or accounts that have been closed.

The screenshot shows the 'Billing Stations' interface. At the top, it displays 'Call SWEET!' and 'ResBill Site #1'. Below this, it shows 'Home > Resident Billing Admin > Billing Stations' and the date 'Thursday, March 27, 2008 - Logout'. There are dropdown menus for '1 - ResBill Site #1' and buttons for 'Open Accounts' and 'Closed Accounts'. A table lists account information with columns: 'Account Extension Number', 'Account Number', 'Account Name', 'Equipment Cost', 'OCC Charge', 'Current Bill Begin', 'Check In Date', and 'Check Out Date'. The first row shows: 34150, 000276, BHRICK, \$31.50, \$0.00, 12/1/2007, 7/1/2007. Below the table is a form for editing the selected account (34150). The form includes fields for 'Extension Number', 'Account Number', 'Account Name', 'Address 1', 'Address 2', 'Address 3', 'City', 'State', 'Zip', 'Plan Number' (set to 3 - Local Plan 3), 'Equip. Cost' (\$031.50), and 'OCC Charge' (\$+000.00). There are also fields for 'Check In (Acct. Open): 07/01/2007 12:00 AM' and 'Check Out (Acct. Close): / / :'. At the bottom, there are 'Save' and 'Cancel' buttons. A footer note says '© 2006 DATEL Software Solutions'.

# Tenant/Resident Billing Application Overview cont.

The Setup Billing Configuration section is where accounts are selected for billing. The main page shows a list of all accounts at a site including extension numbers, account numbers, account names, current bill begin dates and check in/out dates. Each individual column can be filtered, making it easier to find a specific record or groups of records for billing. Click the 'Bill Accounts' button at the bottom of the page once desired accounts are selected for billing.

<input type="checkbox"/>	Ext. Number:	Account Number:	Account Name:	Current Bill Begin:	Check In:	Check Out:
<input type="checkbox"/>	35914	001028	GILBERT, MARY L.	12/28/2007	12/28/2007	
<input type="checkbox"/>	35966	000524	148-W WILLIAMS, A.	12/15/2007	12/15/2007	
<input type="checkbox"/>	35970	000433	150-D PAVITT	12/24/2007	12/24/2007	
<input type="checkbox"/>	35971	000996	150-W NICHOLAS	12/14/2007	12/14/2007	
<input type="checkbox"/>	36937	001130	SMITH, MARILYN J.	12/20/2007	12/20/2007	

The following page allows for the selected bills to be scheduled for running and also gives the user options for cost mark ups and taxes to be added to the bill. Choose to preview the bills or set them to live and they will be sent to the report repository once generated. Local and long distance calls can be marked up by a fixed or percentage amount per call, or not at all - the choice is yours. State sales tax and equipment service tax can also be applied if desired. Once all criteria are selected, the options should be saved and the bills will then be generated at their specified time.

A second tab on the page will take you to a list of all scheduled tasks. The tasks can be filtered by run type, run date, begin date and end date, making it easier to find a specific task or groups of tasks.

Run Date: 03/27/2008 4:11 PM

Bill Begin Date: 03/01/2008 12:00 AM

Bill End Date: 03/31/2008 11:59 PM

Run Type: Preview

**Mark Up Local Calls?**  
 No  
 Fixed Amount Per Call  
 Percentage Amount Per Call

**Mark Up Long Distance Calls?**  
 No  
 Fixed Amount Per Call  
 Percentage Amount Per Call

**Apply State Sales Tax?**  
 No  
 Yes

**Apply Equipment Service Tax?**  
 No  
 Yes

Save  Cancel

# Tenant/Resident Billing Application Overview cont.

View reports and historical billing records in the Billing Report Repository. Each resident/tenant will have a separate billing invoice generated with one billing invoice per page of the report. Billing date, billing period, resident/tenant information and all call details will appear on the invoice in a straightforward manner. The invoice is ready to be delivered to the resident/tenant in either electronic form or print-out. Below is an example of a resident/tenant billing invoice.

TELEPHONE BILL							Page:	1
<b>Extension Number:</b>	3476			<b>Bill Date:</b>	3/31/2008			
<b>Residence Number:</b>	3209 - Baker			<b>Bill Period:</b>	2/27/2008 - 3/26/2008			
<b>Address:</b>	316 2000 May Drive Wittenberg							

  

Date	City	State	Called Number	Minutes	Amount
2/29/2008 11:04:00AM	BUTLER	PA	724-287-4799	1.80	\$0.08
3/1/2008 9:20:00AM	MCMURRAY	PA	724-941-9440	0.60	\$0.01
3/1/2008 2:36:00PM	PITTSBURGH	PA	412-716-9088	0.70	\$0.01
3/1/2008 2:39:00PM	PITTSBURGH	PA	412-773-0557	0.70	\$0.01
3/1/2008 7:58:00PM	PITTSBURGH	PA	412-716-9088	0.70	\$0.01
3/1/2008 8:00:00PM	PITTSBURGH	PA	412-773-0557	6.50	\$0.37
3/4/2008 9:56:00AM	MCMURRAY	PA	724-941-9440	1.40	\$0.05
3/6/2008 6:02:00PM	PITTSBURGH	PA	412-716-9088	0.80	\$0.02
3/7/2008 9:29:00AM	PITTSBURGH	PA	412-716-9088	2.20	\$0.10
3/7/2008 3:09:00PM	PITTSBURGH	PA	412-441-3304	4.90	\$0.27
3/12/2008 2:27:00PM	PITTSBURGH	PA	412-716-9088	0.80	\$0.02
TOTAL USAGE:					<b>\$0.95</b>
SERVICE & EQUIP:					<b>\$20.00</b>
OTHER CHARGES & CREDITS:					<b>\$0.00</b>
STATE TAX:					<b>\$0.00</b>
TOTAL BILL:					<b>\$20.95</b>

An account billing summary will be on the last page of each report that is generated. The summary shows the total charges for each resident/tenant as well as a grand total of all resident/tenant charges for the report.

Page 1 of 15		ACCOUNT BILLING SUMMARY									
Bill Date: 3/31/2008											
	Equip / OCC		Local		Long Distance		Special		Total		
	OCC:	Equip:	Cost:	Charge:	Cost:	Charge:	Cost:	Charge:	Cost:	Charge:	
- 3565											
Ext: 7204	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Abbe, W & H - 3304											
Ext: 3608	\$0.00	\$20.00	\$0.12	\$0.06	\$0.00	\$0.00	\$0.00	\$0.00	\$20.12	\$20.06	
Adelman, Isabelle - 3096											
Ext: 2853	\$0.00	\$0.00	\$1.26	\$0.93	\$0.00	\$0.00	\$0.00	\$0.00	\$1.26	\$0.93	
Albach, Anna - 3501											
Ext: 8223	\$0.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	\$20.00	
Albert, Mary - 3105											
Ext: 2862	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Alger, Violet - 3048											
Ext: 2805	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Altmire, A & D - 3300											
Ext: 3604	\$0.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	\$20.00	
Amiotte, Jane - 3406											
Ext: 7205	\$0.00	\$20.00	\$0.30	\$0.12	\$0.00	\$0.00	\$0.00	\$0.00	\$20.30	\$20.12	
Ankney, Richard/Lind - 3362											
Ext: 3678	\$0.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	\$20.00	
Arnold, Mardelle - 3230											
Ext: 3502	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Aulbach, Anna - 3591											
Ext: 8223	\$0.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	\$20.00	