Customer Billing Management (CBM) & Bill Presentation

Systems used to review and modify charges

The following bill areas feed to **CBM** for departments to modify any necessary charges before they post to Bill Presentation:

- BKP  Iron Mountain Annual Review
- INN  Carolina Inn
- CRC  Computer Repair Service
- DIS  Dispatch Services
- ECD  Ecommerce (FedEx, AirGas - DryIce, Fisher, Dental/Mini Storeroom)
- EHS  Environment, Health & Safety
- FRI  Friday Center Conference Center
- CEU  Friday Center CEU
- PRK  Parking
- PRT  Printing
- DPS  Public Safety
- RFS  Remedy Maintenance
- RIZ  Rizzo Center
- SSC  Student Stores

The following bill areas feed to **Bill Presentation** only without the ability to modify charges in CBM first:

- CCC  Carolina Copy
- AUX  Dining
- ECO  Ecommerce (Air Gas-Cylinder Rental, WEX)
- UTL  Energy Services
- FSB  Facilities Services (includes Mail)
- FBA  Faculty Benefits Administration
- LSV  Laundry
- TEL  Telecom

---

**NEED ACCESS TO CBM?**

Please have your business manager contact Lauren Gardner (lauren_gardner@med.unc.edu) with the following information:

- Your ONYEN
- Dept. ID’s/range of Dept. ID’s you need access to
- Whether you need: (can be any combination of the following)
  - dept. default view privileges
  - dept. default edit privileges
  - ability to modify current month charges

---

**CBM and Bill Presentation Timeline**

- **15th of every month**
  - Transactions feed to CBM for departments to review and modify

- **21st of every month**
  - CBM closes and feeds to Central Accounting to post in ConnectCarolina

- **~3 days after 21st**
  - Transactions feed to Bill Presentation for departments to view
<table>
<thead>
<tr>
<th>Bill Area</th>
<th>Desc 1</th>
<th>Desc 2</th>
<th>Desc 3</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUX - Dining</td>
<td>&quot;Carolina Dining Services&quot;</td>
<td>Dining location</td>
<td>Department/School</td>
<td>NOT USED</td>
</tr>
<tr>
<td>BKP - Iron Mountain Annual Renewal</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>CCC - Carolina Copy</td>
<td>Machine no.</td>
<td>Machine default</td>
<td>NOT USED</td>
<td>NOT USED</td>
</tr>
<tr>
<td>CEU - Friday Center CEU</td>
<td>Serial no.</td>
<td>Name of CEU</td>
<td>Date of CEU</td>
<td>Activity no.</td>
</tr>
<tr>
<td>CRC - Computer Repair Center</td>
<td>Description of charge</td>
<td>Cont. description of charge</td>
<td>Cont. description of charge</td>
<td>Phone # to Contact w/questions</td>
</tr>
<tr>
<td>DIS - Dispatch Services</td>
<td>Description of charge</td>
<td>Cont. description of charge</td>
<td>Rate of pay</td>
<td>Phone # to Contact w/questions</td>
</tr>
<tr>
<td>DPS - Public Safety</td>
<td>Description of charge</td>
<td>Department name</td>
<td>Additional Detail</td>
<td>Additional Detail</td>
</tr>
<tr>
<td>ECD - Ecommerce</td>
<td></td>
<td></td>
<td></td>
<td>DT # is on the paper form the customer fills out. Customer should be receiving the white copy for their record.</td>
</tr>
<tr>
<td>ECO - Ecommerce</td>
<td>FedEx act no. and tracking no.</td>
<td>Shipper name</td>
<td>Recipient name</td>
<td>Reference Note</td>
</tr>
<tr>
<td>EHS - Environmental, Health and Safety</td>
<td>Description of charge</td>
<td>PI name, if applicable</td>
<td>Work Unit, if applicable</td>
<td>The person the charges apply to</td>
</tr>
<tr>
<td>FBA - Faculty Benefits Administration</td>
<td>Month &amp; Year</td>
<td>Name of employee</td>
<td>Benefit type</td>
<td>NOT USED</td>
</tr>
<tr>
<td>FRI - Friday Center Conference Center</td>
<td>Reservation #</td>
<td>Booking department</td>
<td>Reservation date range</td>
<td>NOT USED</td>
</tr>
<tr>
<td>FSB - Facilities</td>
<td>General description of charge</td>
<td>Detailed description of charge</td>
<td>Detailed description of charge, cont.</td>
<td>NOT USED</td>
</tr>
<tr>
<td>INN - Carolina Inn</td>
<td>Person Making Reservation</td>
<td>Reservation/Service For</td>
<td>Type (i.e. parking, food, room, restaurant, etc.)</td>
<td>Department, if applicable</td>
</tr>
<tr>
<td>LSV - Laundry Services</td>
<td>Laundry Ticket #</td>
<td>Date</td>
<td>Customer # in Laundry System</td>
<td>NOT USED</td>
</tr>
<tr>
<td>PRK - Public Safety</td>
<td>Description of charge</td>
<td>Booking department</td>
<td>Additional Detail</td>
<td>Additional Detail</td>
</tr>
<tr>
<td>PRT - Printing</td>
<td>Order no. &amp; date OR description of charge</td>
<td>Date &amp; time entered</td>
<td>Due date</td>
<td>Completed date</td>
</tr>
<tr>
<td>RFS - Remedy Annual Maintenance</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>RIZ - Rizzo Center</td>
<td>Description of charge</td>
<td>Person Making Reservation</td>
<td>Reason for reservation</td>
<td>NOT USED</td>
</tr>
<tr>
<td>SSC - Student Stores</td>
<td>Purchaser</td>
<td>Register/Receipt #</td>
<td>Phone # or Optional Field Provided by Purchaser</td>
<td>Type of purchase (i.e. supplies)</td>
</tr>
<tr>
<td>TEL - Telecom</td>
<td>Description of charge</td>
<td>Phone no. of transaction</td>
<td>NOT USED</td>
<td>NOT USED</td>
</tr>
<tr>
<td>UTL - Energy Services</td>
<td>Utility Service (i.e. Water)</td>
<td>Description of Charge</td>
<td>Meter #</td>
<td>NOT USED</td>
</tr>
</tbody>
</table>

**Notes:**
- **Serial no.**
- **NOT USED**
- **Additional Detail**
- **Department/School**
- **Date of CEU**
- **Activity no.**
- **Phone # to Contact**
- **w/questions**
- **Department, if applicable**
- **NOT USED**
- **Type of purchase (i.e. supplies)**
- **Register/Receipt #**
- **Date**
- **Phone # or Optional Field Provided by Purchaser**
- **Type of purchase (i.e. supplies)**
- **NOT USED**
- **Additional Detail**
- **Date & time entered**
- **Due date**
- **Completed date**
- **Description of charge**
- **Customer Info from Fisher**
- **Type (i.e. parking, food, room, restaurant, etc.)**
- **Department, if applicable**
- **The person the charges apply to**
- **The Register/Receipt # is on the cash register receipt given to the person at the time they make their purchase. There is also an optional "add'l info field" available on the form the purchaser fills out. Although this is a manual process, SStores Acct staff will put this in Desc 3 if provided.**

**WORK IN PROGRESS - Updated 3/12/15**