Adding Prepaid Bill Plans to the Contract
Quick Reference Guide

An Overview of the Award Page

**Navigation**

Grants > Awards > Award Profile (View Contract link)

Or

Customer Contracts > Determine Price and Terms > Prepaid Balances

**Purpose**

Adding a Prepaid Bill Plan for a Scheduled Event Billing or an Advance Billing

### Prepaid Bill Plans

**Adding Prepaid Bill Plans**

1. Click the **More** dropdown list, and choose the **Prepaids** option.

2. On the **Prepaids** page, starting at the **General** tab, enter the **Purchased Amount**. Add additional lines as needed (scroll right to see the + sign, to add a line).

3. Click the **Utilization** tab.

4. Select the **Utilize Against all Lines** checkbox.

5. Click the **Billing Plan** tab, the **Billing Plan Template** and **Bill Plan Detail Template ID** will default from the Business Unit setup.

6. Under the **Deferred Revenue Distribution** tab, the **Distribution Code** should default to **DFR REV**.

7. When complete, click the **Save** button.

8. Click the **Billing Plans** link.

9. On the **Billing Plans** page, assign the one or more Prepaid lines to **Bill Plans**.

10. Use the check box to select the individual sequences of **Prepaids to be Assigned/Unassigned**.

11. Enter/Select the following fields:
   - **Billing Method** (Immediate or Milestone)
   - **Description**
   - **Billing Plan Template** (Immediate or Milestone)
   - **Bill Plan Detail Template ID** (specific to your campus)

12. Continue on page 2
12. Click the **Assign** button.

14. The **Prepaid Plan** is assigned (B102 or greater).

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15. Click the **Bill Plan ID** link (e.g., B102 or greater) to review the **Billing Plan**.

16. The **Billing Default Overrides** section should be reviewed and updated as needed. The values are defaulted for each campus as configured.