Published on *University of Colorado* (https://www.cu.edu)

eComm Billing Process [1]



August 2, 2024 by jennifer.mortensen [2]

The eComm program is 100% funded through annual user fees that are collected from the campuses. The System eComm team works closely with campus eComm specialists on a multi-step process to ensure that users are charged for the correct licenses and that any program growth is accounted for through prorated billing. In order for the billing process to be successful in funding the eComm program, eComm specialists should be aware of the timelines below and ensure that licenses and billing information are updated accordingly.

July

At the beginning of each Fiscal Year, the System eComm team will send an initial invoice to the campuses representing all active users. These users will be charged the full eComm user fee based on a monthly rate for active licenses multiplied by 12 months of licensing. The steps involved in this process are documented below.

- **First Week of July**: System team completes all provisioning and deprovisioning requests, creating an accurate and current count of all active eComm users.
- **Second Week of July**: System team creates invoices (in the form of spreadsheets) that document the license record number, the user name, the active licenses held by the user, and the total billing amount associated with each. The invoices also include a primary campus billing speedtype to which the full invoice will be charged. In some cases, a unit billing speedtype is also provided. Two spreadsheets will be provided: one for Salesforce and Marketing Cloud, and one for Cvent.
- **Third Week of July**: Campus eComm specialists review invoices and ensure that all data is correct and provide approval to the CU System eComm team.
- **Fourth Week of July**: UIS team bills campus speedtypes. If a unit billing speedtype was present on the provided invoices, the campus finance teams will be responsible for completing additional JEs from the campus billing speedtype to the unit billing speedtypes to collect additional funds. The System eComm team will only charge one speedtype per campus. All subsequent fund transfers are managed at the campus level.

REMINDER Each campus will be charged for all active users in July of each year. It is the eComm specialist's responsibility to conduct regular provisioning and deprovisioning of users to ensure that licensing is current an accurate and that user needs are understood.

January

In January of each Fiscal Year, the System eComm team initiates a license true up process to identify any net new users who have been provisioned since July (August - December). A net new user is defined as a new user who did not result from a license transfer. Following identification of net new users, the System will bill campus speedtypes on a prorated basis based on when the net new users were provisioned. The steps involved in this process are documented below.

- **First Week of January**: System team completes all provisioning and deprovisioning requests, creating an accurate and current count of all active eComm users.
- **Second Week of January**: System team asks eComm specialists to review a list of current active users and identify which users are net new.
- **Third Week of January**: System team captures net new users on the license object and compiles prorated billing data in an invoice (spreadsheet). The invoice is sent to the campuses for review and approval.
- **Fourth Week of January**: System team bills campuses for net new licenses. If a unit billing speedtype was present on the provided invoices, the campus finance teams will be responsible for completing additional JEs from the campus billing speedtype to the unit billing speedtypes to collect additional funds. The System eComm team will only charge one speedtype per campus. All subsequent fund transfers are managed at the campus level.

June

In June of each Fiscal Year, the System eComm team initiates a final license true up process to identify any net new users who have been provisioned since December (January - June). A net new user is defined as a new user who did not result from a license transfer. Following identification of net new users, the System will bill campus speedtypes on a prorated basis based on when the net new users were provisioned. The steps involved in this process are documented below.

- **First Week of June**: System team completes all provisioning and deprovisioning requests, creating an accurate and current count of all active eComm users.
- **Second Week of June**: System team asks eComm specialists to review a list of current active users and identify which users are net new.
- **Third Week of June**: System team captures net new users on the license object and compiles prorated billing data in an invoice (spreadsheet). The invoice is sent to the campuses for review and approval.
- **Fourth Week of June**: System team bills campuses for net new licenses. If a unit billing speedtype was present on the provided invoices, the campus finance teams will be responsible for completing additional JEs from the campus billing speedtype to the unit billing speedtypes to collect additional funds. The System eComm team will only charge one speedtype per campus. All subsequent fund transfers are managed at the campus level.

REMINDER In order to prepare for July billing in the new Fiscal Year, eComm specialists should also review all active users in June and submit provisioning or deprovisioning requests

prior to the last business day of the month to ensure an accurate billing cycle can launch in July.

Display Title:
eComm Billing Process
Send email when Published:
Yes

Source URL:https://www.cu.edu/blog/ecomm-wiki/ecomm-billing-process

Links
[1] https://www.cu.edu/blog/ecomm-wiki/ecomm-billing-process [2] https://www.cu.edu/blog/ecomm-wiki/author/13789