9.2 Creating a Billing Worksheet

**Purpose:** To create a billing worksheet in ctcLink.

**Audience:** Billing staff

Create a Billing Worksheet

**Create Worksheet**

**Navigation:** NavBar > Navigator > Billing > Interface Transactions > Process Billing Interface

The Process Billing Interface search page displays.

1. On the search page, enter a new or existing Run Control ID.
2. Select the Add or Search button. The Process Billing Interface will display.

3. On the Process Billing Interface page, enter the Interface ID that was processed from Contracts in the From Interface ID and To Interface ID fields.
4. Select the Run button. The Process Scheduler Request page will display.
5. On the Process Scheduler Request page, select the checkbox for the **Billing Interface** from the process list.
6. Select the **OK** button. The Process Billing Interface page will display.

8. Select the **Process Monitor** link. The Process Monitor page will display.
9. On the Process list tab, select the **Refresh** button until the **Run Status** = Success and the **Distribution Status** = Posted.
Update Billing Worksheet

**Navigation:** Navigator > Billing > Manage Billing Worksheet > Update Billing Worksheet

The Update Billing Worksheet search page displays.

1. On the search page, select the **Search** button. The Search Results will display.
2. From the Search Results, select the **Billing Worksheet** created in the previous section on the Worksheet Headers tab. The worksheet will begin with TMP for Temporary.
3. Select the checkbox for the applicable Billing Worksheet. The Line Details will display.
4. On the Line Details tab, choose a billing option:
   - **Bill**
- **Defer** (If you chose Defer you will need to select the date that you would like to defer the line to invoice next.)
- **Write Off**

5. Select the **Save** button.
6. Select the **Worksheet Headers** link. The Worksheet Headers page will display.
7. Select the item and either **Approve** or **Delete**.

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If you **delete** the Billing Worksheet it will make the lines available to be used on an invoice and can be accessed by creating an interface ID (as you did in the Prerequisite process.)

If you **approve** the worksheet the worksheet will be an invoice. The only way to edit or modify an invoice after it is approved is by the credit and Rebill process.

8. The process to create a billing worksheet is now complete.