Chapter 5

Entering Driver Field Trip Miles and Hours and Billing Field Trips

There are many advantages to billing for your field trips if you are a school district. You have a higher degree of accuracy for the true costs of your field trips. You can more quickly identify those funds that have not been accurately transferred to the transportation department for field trip services rendered. You can help both individual schools as well as your district budget for field trip costs. You can also assist schools and the district in monitoring field trip budget balances.

If you are a private contractor then, of course, you must bill for field trip. It is one of your main income sources.

T.O.M. makes billing trips as easy as a two-step process. First enter driver hours and miles then click a button and T.O.M. prints a bill. Or, if you need a more sophisticated process T.O.M. allows you to enter the driver's hours and miles for field trips at various times and then later bill a group of field trips. T.O.M. lets you print / reprint field trip invoices before or after you have billed the field trip. T.O.M. also lets you print a Field Trip Statement that shows summary billing, payment and adjustment activity for the field trip.

In this chapter you will learn:

- Entering a Driver's Field Trip Hours and Miles

- Entering Driver Expenses

- Using the Driver's Post Date for Payroll Reports

- How T.O.M. Calculates the Amount to Bill a Field Trip

- Billing A Single Field Trip

- Correcting Mistakes AFTER You Have Billed Your Field Trip

- Reprinting the Invoice of A Single Trip

- Printing A Field Trip Statement

- Billing A Group of Field Trips

- Printing / Reprinting A Field Trip Invoice For A Group of Trips

- Using the Group Estimate, Invoice or Billing Preparation Report Routine

Entering a Driver's Field Trip Hours and Miles

After the field trip is over you need to capture the actual miles of the field trip and the actual driver hours that were required to perform the field trip. Most districts have the drivers record their field trip miles and hours using the Field Trip Ticket that T.O.M. automatically prints when it assigns drivers to a field trip. You may, however, use any form that you prefer.

The following is a detailed discussion on the process of entering driver field trip miles and hours:

1. Retrieve the field trip you wish to enter driver miles and hours by using the Field Trip Search / Selection screen (see Figure 1-2 in *Chapter 1 - Entering Field Trips, Printing Estimates and Using the Field Trip Inquiry* of this manual). Click on the field trip that you desire and click the Edit button. The Detailed Field Trip screen is displayed (Figure 5-1).

2. Click the Trip Driver Info button (Figure 5-1).

Click the Trip Driver Info button to enter driver miles and hours.

Figure 5-1. The Trip Driver Info Button

This will cause the Trip Driver Information screen (Figure 5-2) to display.

The Trip Driver Information screen uses three tabs to help you enter data in an organized fashion. They are the General tab, the Notes tan and the Other tab. Click on the tab to see its options.

Click on a tab to view its options.

Figure 5-2. Trip Driver Information Screen

3. Enter the driver's miles and hours in the following ways:

    - Enter the driver's miles and hours that are already calculated.

      If you have already calculated the driver's miles and hours and simply need to enter them into T.O.M., then just enter the field trip miles and hours for each driver in the Miles and Hours fields. You may enter both partial miles and partial hours. See (Figure 5-3) as an example. When you are finished click the Exit button and you will be returned to the Detailed Field Trip screen (Figure 5-1).

Driver miles and hours fields where each driver's actual field trip miles and hours are entered.

Figure 5-3. Trip Driver Information Screen With Driver Miles and Hours Entered

    - Enter the driver's miles and hours using odometer readings and times and have T.O.M. calculate the miles and hours.

      Many schools have the drivers log down the beginning and ending odometer readings and times when they perform the field trip. T.O.M. will allow you to enter these odometer readings and beginning and ending times and then calculate the miles and hours for you. This allows you to enter the driver's miles and hours without having to perform any preparation work on the driver's trip tickets. The following are three examples of using these fields and how T.O.M. calculates the miles and hours for you. When you are finished click the Exit button and you will be returned to the Detailed Field Trip screen (Figure 5-1).

Example 1:
Entering simple beginning and ending odometer readings and times and having T.O.M. calculate the miles and hours.

In this example you are simply entering the driver's beginning and ending odometer readings and the driver's beginning and ending times and then clicking the **Calc Miles** and **Calc Hours** buttons and T.O.M. automatically calculates the miles and hours and places them in the Miles and Hours Fields (Figure 5-4).

T.O.M. automatically calculates the driver's miles and hours from the Odometer and Time entries.

Figure 5-4. Trip Driver Information Screen With Driver Beginning and Ending Odometer Readings and Times Entered and T.O.M. Calculating Trip Miles and Hours

Enter the driver's beginning and ending odometer readings and then click the Calc Miles button.

Enter the driver's beginning and ending times and then click the Calc Hours button.

Example 2:
Entering four sets of odometer readings and times and having T.O.M. calculate the miles and hours (Figure 5-5).

In this example you are entering four sets of odometer readings and times and then clicking the Calc Miles and Calc Hours buttons. The Beginning and Ending odometer readings and times are the odometer readings when you leave and arrive back at the school or bus garage. The Arrival and Departing odometer readings and times are the odometer readings when you arrive at the destination and leave the destination. A typical example of when you would use four sets of odometer readings and times is when the drivers are performing a *drop and return* or *shuttle trip* where the driver takes the passengers to the destination and drops them off at the destination. The driver then leaves the destination and performs another job like a route or another field trip. The driver then later returns to the destination and picks up the passengers and returns them back to the school. In this scenario T.O.M. is sophisticated enough to calculate the mileage between the Beginning and Arrival odometer readings and hours and between the Leave and Ending odometer readings and hours. T.O.M. then totals the miles and hours between these two segments and places them in the Miles and Hours fields in the Trip Driver Information screen (Figure 5-5).

T.O.M. automatically calculates the driver's miles and hours from the Odometer and Time entries.

Figure 5-5. Trip Driver Information Screen With Driver Beginning, Arrival, Leave and Ending Odometer Readings and Times Entered and T.O.M. Calculating Trip Miles and Hours

Enter the driver's beginning, arrival, leave and ending odometer readings and then click the Calc Miles button. Enter the driver's beginning, arrival, leave and ending times and then click the Calc Hours button.

Example 3
Enter simple beginning and ending odometer readings and times and have T.O.M. calculate the miles and hours including adding customer miles and hours to the miles and hours calculated from the odometer readings and times (Figure 5-6).

Many districts have their drivers log the beginning and ending odometer readings and times from *school to school*. This means that the drivers log the odometer readings and time when they start the field trip at the school and when they return back to the school. Those districts then add an additional number of miles and time that it takes a driver to drive to the school from the bus garage and then back. T.O.M. allows you to enter this standard miles and time in your customer screen. Then whenever you instruct T.O.M. to calculate a driver's actual miles or hours from the odometer readings and times T.O.M. will check and see if you have set up additional miles and hours for that customer. If you have entered these additional miles and hours T.O.M. will display those miles and hours on the Trip Driver Information screen and add them to the calculated miles and hours (Figure 5-6).

T.O.M. automatically calculates the driver's miles and hours from the Odometer and Time entries.

Figure 5-6. Trip Driver Information Screen With Driver Beginning and Ending Odometer Readings and Times Entered and T.O.M. Calculating Trip Miles and Hours Also Using the Customer Miles and Hours

Enter the driver's Beginning, and Ending odometer readings and then click the Calc Miles button.
Enter the driver's Beginning, Ending times and then click the Calc Hours button.

T.O.M. adds the miles and hours that you set up in the Customer Screen to the calculated miles and hours.

Example 4:
*Entering four sets of odometer readings and times and having T.O.M. calculate the miles and hours and wait time hours (*Figure 5. 7*).*

In this example you are entering four sets of odometer readings and times, clicked the **Calc Wait Time** check box and then clicking the **Calc Miles** and **Calc Hours** buttons. The Beginning and Ending odometer readings and times are the odometer readings when you leave and arrive back at the school or bus garage. The Arrival and Departing odometer readings and times are the odometer readings when you arrive at the destination and leave the destination. Normally, if a driver has four sets of odometer readings and times they are either performing a *drop and return* type trip or they are performing a trip with wait time (time the driver is not driving merely waiting for the passengers at the destination site). If you check the Calc Wait Time check box you are telling T.O.M. to calculate the mileage between the Arrival hours and the Leave hours as the wait time. T.O.M. then places this wait time in the Wait Time Field (Figure 5. 7).

T.O.M. automatically calculates the driver's miles and hours from the Odometer and Time entries.

T.O.M. automatically calculates the driver's wait time from the driver's arrival and leave times.

Figure 5. 7. Trip Driver Information Screen With Driver Beginning, Arrival, Leave and Ending Odometer Readings and Times Entered and T.O.M. Calculating Trip Miles and Hours AND Wait Time

Enter the driver's beginning, arrival, leave and ending odometer readings and then click the Calc Miles button. Enter the driver's beginning, arrival, leave and ending times and then click the Calc Hours button.

Check Cacl Wait Time before clicking the Calc Hours Button to have T.O.M. calculate the drivers wait time

What about over time wait time?

Currently, T.O.M. does not automatically calculate the amount of wait time that was in overtime. However, T.O.M. does allow you to enter the number of wait time hours that were in overtime for a driver for a field trip. These hours are stored in the field titled 'OT Wait Time:' (*Figure 5. 7*). T.O.M. allows you to have a different hourly rate for overtime wait time in both the Billing Rates Screen as well as the six employee rates.

Entering A Driver's Expenses

Sometimes when a driver performs a field trip he / she will incur expenses that you may want to bill the customer. Of course, T.O.M. will allow you to enter flat amounts in for a field trip. However, what if more than one driver has performed a field trip and each driver incurs a different expense that you want to bill the customer? A typical example of this is if you had an overnight field trip that had multiple drivers and each driver had an expense account for the trip that needed to be billed to the customer. T.O.M. allows you to enter this information in the Trip Driver Information screen for each driver assigned to the field trip (Figure 5-8). T.O.M. will then add this amount to the invoice amount of the field trip.

Enter the dollar amount of a specific driver's field trip expense for that field trip.

Figure 5-8. Entering Driver's Field Trip Expense Amount

Using the Driver's Post Date for Payroll Reports

Many school districts must report a driver's field trip hours separate from the driver's other hours. In general this information is easy to retrieve from T.O.M. by simply listing all of the field trips with the driver's actual hours the driver has taken over a certain period of time. However, this can be complicated if the driver turns in his / her trip tickets so late that they must be reported during a later payroll period. Trying to retrieve a report that showed for example all the field trip hours a driver had for one week and include with it the field trip hours the driver had for a prior week that were *turned in* this week is not possible with the some of the standard field trip information and reports that T.O.M. keeps.

Fortunately, T.O.M. has a feature to help with this situation. When you enter a driver's actual hours or have T.O.M. calculate those actual hours T.O.M. records that date that this was done in a field called the *Post Date* (Figure 5-9), which is located on the Other tab of the Trip Driver Information screen. This is the date that the employee's actual hours were *posted* or entered into the computer for a field trip. You may change this date. T.O.M. then offers you a special report called the Employee Payroll Report that allows you to print the driver's field trip hours for a range of POST DATES. The combination of the Post Date and the Employee Payroll Report give you the tracking that you need to accurately report an employee's field trip hours for any payroll period.

Click on the Other tab.

The Post Date automatically defaults to the date of the day that you enter the driver's actual hours. But it can be changed.
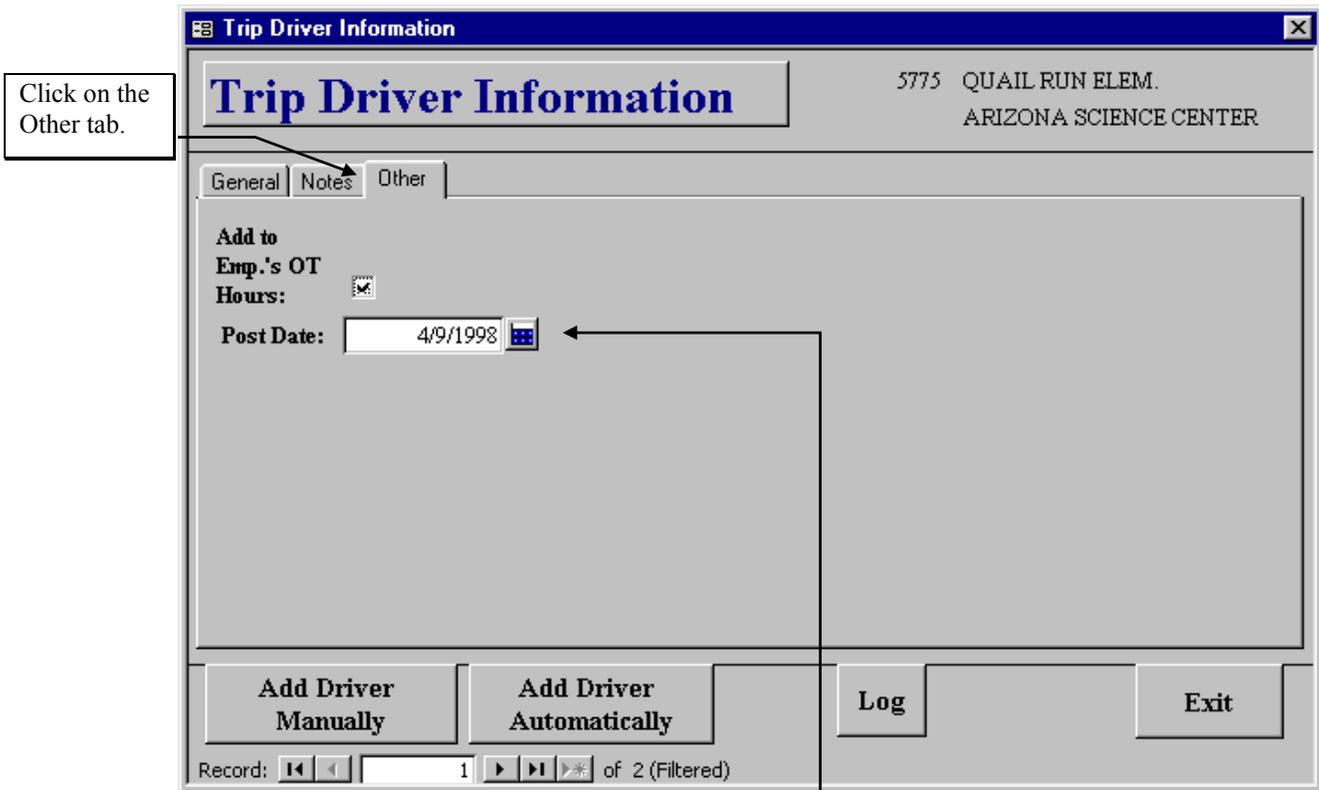
Figure 5-9. The Post Date (or Date the Employee's Actual Time Was Entered into T.O.M.)

Using the Hours Paid Field for Payroll Reports

The Hours Paid field defaults to the hours billed. For example, Figure 5-10 shows 4.50 billed hours and 4.50 paid hours.

The Hours Paid field defaults to the hours billed, but it can be changed. This amount will show up in the Employee Payroll Reports.

Figure 5-10. The Hours Paid Field for Payroll Reports

You can override the paid hours by entering a different amount in the Hours Paid field. This amount will show up in the Employee Payroll Reports as described in *Chapter 8 – Management Reports* later in this manual.

Telling T.O.M. Whether to Add the Employee's Field Trip Hours to the Employees Weekly / Daily Hours for Overtime Determination

The Add to Emp.'s OT Hours checkbox (Figure 5-11) defaults to the setting (checked or unchecked) designated in the Other field of the District Options screen. (See *Chapter 4 – District Options* in the *T.O.M. Getting Started Manual*). You can override the District Options setting for this field trip by checking or unchecking the Add to Emp.'s OT Hours checkbox.
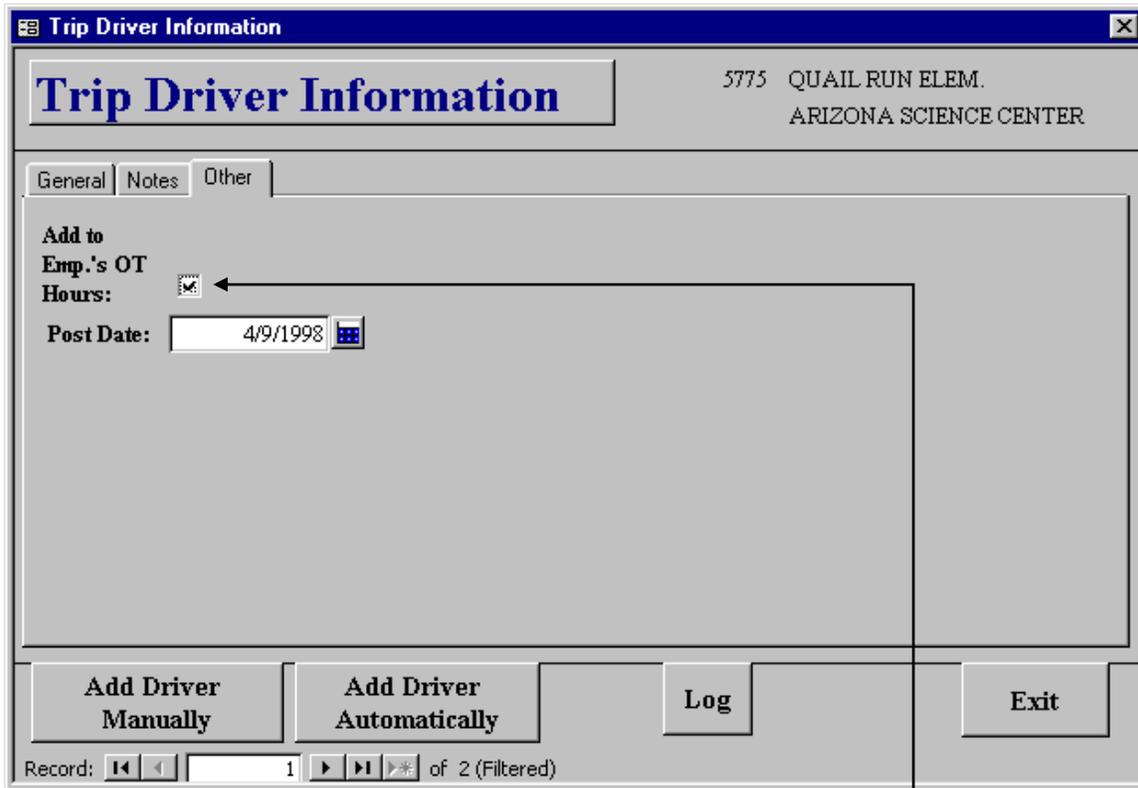
Figure 5-11. The Add to Emp.'s OT Hours Checkbox

The Add to Emp.'s OT Hours defaults to the setting (checked or unchecked) designated in the Other tab of the District Options screen.

Sometimes you may not want an employee's hours for a field trip to be considered when T.O.M. calculates the daily or weekly hours for overtime preclusion. For example, you may have a last minute trip that you badly need a driver to take. As an incentive you offer a driver that if he / she takes the trip the hours for that trip will not go against that drivers total hours for the week / day when considering field trip assignments for other field trips. (In other words, 'this won't go against your overtime hours'). T.O.M. allows you to do this with the Add to Emp's OT hours field .

If this checkbox is checked, T.O.M. automatically calculates employee's daily and weekly OT hours for a field trip as it does by default. If this checkbox is unchecked, T.O.M. will not add these field trip hours when determining if any new field trip assignments for this employee should be skipped due to overtime preclusion.

Manually Telling T.O.M. How Many Overtime Hours to Bill for Field Trip

Normally T.O.M. calculates a driver's daily and weekly OT hours that will be billed to the customer for the field trip. As shown in Figure 5-12, the Calculate OT checkbox will be checked. This checkbox is designated in the Other field of the District Options screen. (See *Chapter 4 – District Options* in the *T.O.M. Getting Started Manual*.

Figure 5-12. Uncheck the Calculate OT Checkbox to Manually Enter OT Hours

T.O.M. will automatically calculate a driver's daily and weekly OT hours. If you uncheck the Calculate OT checkbox, you can then manually enter hours in the OT hours field (Figure 5-13).

However, you can uncheck the Calculate OT checkbox and then manually enter the amount of overtime hours in the OT Hours field, as shown in Figure 5-13. T.O.M. will bill the overtime rate based on the hours entered in this field.

Figure 5-13. Manually Enter OT Hours for T.O.M. to Bill Overtime Rates

With the Calculate OT check box unchecked, you can manually enter the OT hours for T.O.M. to bill overtime rates.

NOTE: This impacts *only* field trips that use a billing rate with billing instructions set to "Employee Rates with OT" or "Employee Rates with Daily OT."

Entering Driver Notes

You can enter notes about the selected driver on the Notes tab of the Trip Driver Information screen (Figure 5-14). For example, you might enter notes about the driver's performance or timeliness on the field trip, notes why the driver refused a trip or notes about the driver's attitude about the trip. The notes should apply only to *this* driver and only about *this* field trip.

Figure 5-14. Entering Driver Notes

Driver notes can be independently authorized in the security portion of T.O.M. See the Driver Notes report in *Chapter 8 – Management Reports* later in this manual that reports these notes.

How T.O.M. Calculates the Amount to Bill a Field Trip

T.O.M. is very flexible in when and how you may bill for your field trips. You may bill a single field trip or you may bill a group of field trips. T.O.M. allows you many different options as to how T.O.M. is to calculate how much to bill for a field trip. You specify how T.O.M. is to calculate the amount to bill a field trip by the billing rate that you selected for the field trip and the billing instructions you selected for the billing rate. The following is a detailed discussion of each of the major ways that you can bill field trips using T.O.M. This is not an exhaustive discussion. There are many combinations of elements such as different rates, minimum amounts, flat amounts, customer amounts and employee expenses that allow you wide number of choices in how your field trip bills get calculated. This is just a discussion of the major options available to you when defining field trip billing:

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Rate' in the Billing Instructions

When the billing rate that you assigned to the field trip has a billing instruction of 'RATE' then you are telling T.O.M. that you basically want to multiply the driver's actual hours by an hourly rate and the driver's actual miles by a mileage rate. Both the mileage rate and the hourly rate are entered in the Billing Rate Screen. You may, of course, also add some flat amounts to this calculated amount. You may also instruct T.O.M. to use a minimum number of hours or miles or dollar amount when calculating a field trip amount. Specifically the formula that T.O.M. uses when calculating the amount to bill a field trip that has a billing rate that has 'RATE' for the instructions is as follows:

Trip Amount = Total Driver Amount + Total of 5 Flat Miles

Total Driver Amount = Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip

Each Driver's Cost = (Driver's Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours x Employee's Hourly Rate) + Driver's Employee Expense for the Trip + Customer Amount (entered in the Customer Screen).

NOTE: If the Driver's Actual Miles are less than the Minimum Miles entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Miles by the Mileage Rate rather than the Actual Miles.

If the Driver's Actual Hours are less than the Minimum Hours entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Hours by the Hourly Rate rather than the Actual Hours.

If the Driver's Cost is less than the Minimum Amount entered in the Billing Rate Screen then T.O.M. will use the Minimum Amount for that driver rather than the calculated driver cost.

Let's look at an example of how this formula would work:

Example Field Trip: Field Trip Billing Rate: INDIST   Number of Drivers: 2
Field Trip Customer: Echo Mountain
Flat Amount #1: $50 #2: $20 #3: $0 #4: $0 #5: $0

Driver 1: Kathy Unger	Actual Miles: 35	Actual Hours: 2	Driver Expense: 0
Driver 2: Sandy Werser	Actual Miles: 36	Actual Hours: 1.75	Driver Expense: 35

Example Billing Rate: **Example Customer:**
Billing Rate: INDIST   Customer Name: Echo Mountain
Billing Instructions: RATE   Customer Amount: 0
Mileage Rate: $.60
Hourly Rate: $15.00
Minimum Miles: 0
Minimum Hours: 2
Minimum Amount: 0

Field Trip Calculation:

Each Driver's Cost = (Driver's Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours Billing Rate's Hourly Rate) + Driver's Employee Expense for the Trip + Customer Amount (entered in the Customer Screen).

Kathy Unger's Total Charge = (35 x .6) + (2 * 15) + 0 + 0 = $51
Sandy Werser's Total Charge = (36 x .6) + (2 * 15) + 35 + 0 = $86.6

(Notice that the Minimum Hours of 2 was used for Sandy instead of her actual hours of 1.75.)

Total Driver Amount = Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Total Driver Amount = $51 + $86.6 = $137.6

Trip Amount = Total Driver Amount + Total of 5 Flat Miles
Trip Amount = $137.60 + $50 + $20 + $0 + $0 + $0 = $207.60

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Employee Rates' in the Billing Instructions

When the billing rate that you assigned to the field trip has a billing instruction of 'EMPLOYEE RATES' then you are telling T.O.M. that you want to multiply the driver's actual hours and actual miles by one of the six hourly rates that you specified for each employee in the Employee Screen and mileage rate that you specified in the Billing Rate Screen. You may, of course, also add some flat amounts to this calculated amount. You may also instruct T.O.M. to use a minimum number of hours or miles or dollar amount when calculating a field trip amount. Specifically the formula that T.O.M. uses when calculating the amount to bill a field trip that has a billing rate that has 'EMPLOYEE RATES' for the instructions is as follows:

Trip Amount = Total Driver Amount + Total of 5 Flat Miles

Total Driver Amount = Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip

Each Driver's Cost = (Driver's Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours x Employee's Hourly Rate (1-6)) + Driver's Employee Expense for the Trip + Customer Amount (entered in the Customer Screen).

> **NOTE:** If the Driver's Actual Miles are less than the Minimum Miles entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Miles by the Mileage Rate rather than the Actual Miles.
>
> If the Driver's Actual Hours are less than the Minimum Hours entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Hours by the Hourly Rate rather than the Actual Hours.
>
> If the Driver's Cost is less than the Minimum Amount entered in the Billing Rate Screen then T.O.M. will use the Minimum Amount for that driver rather than the calculated driver cost.

Let's look at an example of how this formula would work:

Example Field Trip: Field Trip Billing Rate: INDIST   Number of Drivers: 2
Field Trip Customer: Echo Mountain
Flat Amount #1: $50 #2: $20 #3: $0 #4: $0 #5: $0

Driver 1: Kathy Unger   Actual Miles: 35   Actual Hours: 2   Driver Expense: 0   Rate #1: $13
Driver 2: Sandy Werser   Actual Miles: 36   Actual Hours: 1.75   Driver Expense: 35   Rate #1: $14.5

Example Billing Rate: **Example Customer:**
Billing Rate: INDIST   Customer Name: Echo Mountain
Billing Instructions: Employee Rate   Customer Amount: 0
            With OT
Mileage Rate: $.60
Hourly Rate: $15.00   # of Employee Rate to use: 1
Minimum Miles: 0
Minimum Hours: 2
Minimum Amount: 0

Field Trip Calculation:

Each Driver's Cost = (Driver's Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours x Employee's Hourly Rate (1-6)) + Driver's Employee Expense for the Trip + Customer Amount (entered in the Customer Screen).

Kathy Unger's Total Charge = (35 x .6) + (2 * 13) + 0 + 0 = $47
Sandy Werser's Total Charge = (36 x .6) + (2 * 14.5) + 35 + 0 = $85.6
(Notice that the Minimum Hours of 2 was used for Sandy instead of her actual hours of 1.75.)

Total Driver Amount = Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Trip Amount = Total Driver Amount + Total of 5 Flat Miles
Total Driver Amount = $47 + $85.6 = $132.6
Trip Amount = $132.60 + $50 + $20 + $0 + $0 + $0 = $202.60

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Employee Rates with OT' in the Billing Instructions

When the billing rate that you assigned to the field trip has a billing instruction of 'EMPLOYEE RATES WITH OT' then you are telling T.O.M. that you want to multiply the driver's actual hours and actual miles by one of the six hourly rates that you specified for each employee in the Employee Screen and mileage rate that you specified in the Billing Rate Screen. (However, if you manually enter the overtime hours (see Figure 5-13) T.O.M. would *not* calculate the OT Hours.)

Further, you are telling T.O.M. to determine if the field trip assignment put a driver into overtime hours. If the field trip did cause a driver to experience overtime hours you instructed T.O.M. to calculate the number of hours that the employee was paid due to this field trip assignment. T.O.M. will then calculate these overtime hours by one of the six Overtime Hourly Billing Rates that you specified for each employee in the Employee Screen. T.O.M. will add this overtime amount to the total amount billed to the customer.

You may, of course, also add some flat amounts to this calculated amount. You may also instruct T.O.M. to use a minimum number of hours or miles or dollar amount when calculating a field trip amount. Specifically the formula that T.O.M. uses when calculating the amount to bill a field trip that has a billing rate that has 'EMPLOYEE RATES WITH OT' for the instructions is as follows:

Trip Amount	=	Total Driver Amount + Total of 5 Flat Miles
Total Driver Amount	=	Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Each Driver's Cost	=	(Driver's Actual Miles x Billing Rate's Mileage Rate) + ((Driver's Actual Hours - Driver Trip Overtime Hours) x Employee's Hourly Rate (1-6)) + (Driver Trip Overtime Hours x Employee's Overtime Hourly Billing Rate (1-6)) + Driver's Employee Expense for the Trip + Customer Amount (entered in the Customer Screen).
Driver's Trip Overtime Hours	=	((Total Average Weekly Hours entered in Employee Hours Screen) + (Hours of all Field Trips that the Driver is Assigned to Taken BEFORE This Field Trip) + (Driver's Actual Hours of Field Trip Being Billed)) - Weekly Overtime Hours Limit (Set in Employee Type Screen or District Options Screen)

> **NOTE:** If the Driver's Actual Miles are less than the Minimum Miles entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Miles by the Mileage Rate rather than the Actual Miles.
>
> If the Driver's Actual Hours are less than the Minimum Hours entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Hours by the Hourly Rate rather than the Actual Hours.
>
> If the Driver's Cost is less than the Minimum Amount entered in the Billing Rate Screen then T.O.M. will use the Minimum Amount for that driver rather than the calculated driver cost.

Let's look at an example of how this formula would work:

Example Field Trip: Field Trip Billing Rate: INDIST   Number of Drivers: 2
Field Trip Customer: Echo Mountain
Flat Amount #1: $50 #2: $20 #3: $0 #4: $0 #5: $0

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Employee Rates with OT' in the Billing Instructions (continued)

Example Billing Rate: **Example Customer:**

Billing Rate: INDIST   Customer Name: Echo Mountain
Billing Instructions: Employee Rates   Customer Amount: 0
                    With Daily OT
Mileage Rate: $.60
Hourly Rate: $15.00   # of Employee Rate to use: 1
Minimum Miles: 0
Minimum Hours: 2
Minimum Amount: 0

Example Employees:

Driver Name: Kathy Unger   Driver Hourly Billing Rate #1: $13.00
                                 Driver Hourly Overtime Billing Rate #1: $20
                                 Average non field trip hours: 35
                                 Field Trip Hours Before Field Trip being Billed: 5
                                 Weekly Overtime Hours Limit: 40
Driver Name: Sandy Werser   Driver Hourly Billing Rate #1: $14.50
                                 Driver Hourly Overtime Billing Rate #1: $22
                                 Average non field trip hours: 30
                                 Field Trip Hours Before Field Trip being Billed: 5
                                 Weekly Overtime Hours Limit: 40

Field Trip Calculation:

Driver's Trip Overtime Hours =
          ((Total Average Weekly Hours entered in Employee Hours Screen) + (Hours of all
          Field Trips that the Driver is Assigned to Taken BEFORE This Field Trip) +
          (Driver's Actual Hours of Field Trip Being Billed)) - Weekly Overtime Hours
          Limit (Set in Employee Type Screen or District Options Screen)

Kathy Unger's Overtime Hours = (35 + 5 + 2) - 40 = 2
Sandy Werser's Overtime Hours = (30 + 5 + 1.75) - 40 = -3.25 (0)

Each Driver's Cost = (Driver's Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours x
          Employee's Hourly Rate (1-6)) + (Driver Trip Overtime Hours x Employee's
          Overtime Hourly Billing Rate (1-6)) + Driver's Employee Expense for the Trip +
          Customer Amount (entered in the Customer Screen).

Kathy Unger's Total Charge = (35 x .6) + (2-2 x 13) + (2 x 20) + 0 + 0 = $61
Sandy Werser's Total Charge = (36 x .6) + (2 - *0* * 14.5) + (0 x 22) + 35 + 0 = $85.6

(Notice that the Minimum Hours of 2 was used for Sandy instead of her actual hours of 1.75)

Total Driver Amount   =   Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Total Driver Amount   = $61 + $85.6 = $146.60

Trip Amount   =   Total Driver Amount + Total of 5 Flat Miles
Trip Amount   = $146.60 + $50 + $20 + $0 + $0 + $0 = $216.60

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Employee Rates with Daily OT' in the Billing Instructions

When the billing rate that you assigned to the field trip has a billing instruction of 'EMPLOYEE RATES WITH DAILY OT' then you are telling T.O.M. that you want to multiply the driver's actual hours and actual miles by one of the six hourly rates that you specified for each employee in the Employee Screen and mileage rate that you specified in the Billing Rate Screen. (However, if you manually enter the overtime hours (see Figure 5-13) T.O.M. would *not* calculate the OT Hours.)

Further, you are telling T.O.M. to determine if the field trip assignment put a driver into overtime hours. If the field trip did cause a driver to experience overtime hours you instructed T.O.M. to calculate the number of hours that the employee was paid due to this field trip assignment. T.O.M. will then calculate these overtime hours by one of the six Daily Overtime Hourly Billing Rates that you specified for each employee in the Employee Screen. T.O.M. will add this overtime amount to the total amount billed to the customer.

You may, of course, also add some flat amounts to this calculated amount. You may also instruct T.O.M. to use a minimum number of hours or miles or dollar amount when calculating a field trip amount. Specifically the formula that T.O.M. uses when calculating the amount to bill a field trip that has a billing rate that has 'EMPLOYEE RATES WITH DAILY OT' for the instructions is as follows:

Trip Amount	=	Total Driver Amount + Total of 5 Flat Miles
Total Driver Amount	=	Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Each Driver's Cost	=	(Driver's Actual Miles x Billing Rate's Mileage Rate) + ((Driver's Actual Hours - Driver Trip Overtime Hours) x Employee's Hourly Rate (1-6)) + (Driver Trip Daily Overtime Hours x Employee's Daily Overtime Hourly Billing Rate (1-6)) + Driver's Employee Expense for the Trip + Customer Amount (entered in the Customer Screen).
Driver's Trip Overtime Hours	=	((Total Average Weekly Hours entered in Employee Hours Screen) + (Hours of all Field Trips that the Driver is Assigned to Taken BEFORE This Field Trip) + (Driver's Actual Hours of Field Trip Being Billed)) - Weekly Overtime Hours Limit (Set in Employee Type Screen or District Options Screen)

> **NOTE:** If the Driver's Actual Miles are less than the Minimum Miles entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Miles by the Mileage Rate rather than the Actual Miles.
>
> If the Driver's Actual Hours are less than the Minimum Hours entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Hours by the Hourly Rate rather than the Actual Hours.
>
> If the Driver's Cost is less than the Minimum Amount entered in the Billing Rate Screen then T.O.M. will use the Minimum Amount for that driver rather than the calculated driver cost.

Let's look at an example of how this formula would work:

Example Field Trip: Field Trip Billing Rate: INDIST   Number of Drivers: 2
Field Trip Customer: Echo Mountain
Flat Amount #1: $50 #2: $20 #3: $0 #4: $0 #5: $0

(continued on next page)

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Employee Rates with Daily OT' in the Billing Instructions (continued)

Example Billing Rate: **Example Customer:**

Billing Rate: INDIST   Customer Name: Echo Mountain
Billing Instructions: RATE   Customer Amount: 0
Mileage Rate: $.60
Hourly Rate: $15.00   # of Employee Rate to use: 1
Minimum Miles: 0
Minimum Hours: 2
Minimum Amount: 0

Example Employees:

Driver Name: Kathy Unger   Driver Hourly Billing Rate #1: $13.00
                                           Driver Hourly Daily Overtime Billing Rate #1: $18
                                           Average non field trip hours: 35
                                           Field Trip Hours Before Field Trip being Billed: 5
                                           Weekly Overtime Hours Limit: 40
Driver Name: Sandy Werser   Driver Hourly Billing Rate #1: $14.50
                                           Driver Hourly Daily Overtime Billing Rate #1: $21
                                           Average non field trip hours: 30
                                           Field Trip Hours Before Field Trip being Billed: 5
                                           Weekly Overtime Hours Limit: 40

Field Trip Calculation:

Driver's Trip Overtime Hours =

> ((Total Average Weekly Hours entered in Employee Hours Screen) + (Hours of all Field Trips that the Driver is Assigned to Taken BEFORE This Field Trip) + (Driver's Actual Hours of Field Trip Being Billed)) - Weekly Overtime Hours Limit (Set in Employee Type Screen or District Options Screen)

Kathy Unger's Overtime Hours = (35 + 5 + 2) - 40 = 2
Sandy Werser's Overtime Hours = (30 + 5 + 1.75) - 40 = -3.25 (0)

Each Driver's Cost   =   (Driver's Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours x Employee's Hourly Rate (1-6))+ (Driver Trip Daily Overtime Hours x Employee's Daily Overtime Hourly Billing Rate (1-6)) + Driver's Employee Expense for the Trip + Customer Amount (entered in the Customer Screen).

Kathy Unger's Total Charge = (35 x .6) + (2-2 x 13) + (2 x 18) + 0 + 0 = $57
Sandy Werser's Total Charge = (36 x .6) + (2 - *0* * 14.5) + (0 x 21) + 35 + 0 = $85.6

(Notice that the Minimum Hours of 2 was used for Sandy instead of her actual hours of 1.75)

Total Driver Amount   =   Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Total Driver Amount   = $57 + $85.6 = $142.60

Trip Amount   =   Total Driver Amount + Total of 5 Flat Miles
Trip Amount   = $142.60 + $50 + $20 + $0 + $0 + $0 = $212.60

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Step Rates' in the Billing Instructions

When the billing rate that you assigned to the field trip has a billing instruction of 'STEP RATES' then you are telling T.O.M. that you basically want to multiply the driver's actual hours by an hourly rate and the driver's actual miles by a mileage rate. Both the mileage rate and the hourly rate are entered in the Billing Rate Screen. Further, you are telling T.O.M. that you have two mileage rates and two hourly rates that you want to use. In your Billing Rates Screen you have setup a limit for your miles and / or hours. You have told T.O.M. to bill at the first mileage / hourly rate up and until the miles / hours hit the limit of miles and hours you have entered and then to bill all further miles / hours at the second mileage / hourly rate. You may, of course, also add some flat amounts to this calculated amount. You may also instruct T.O.M. to use a minimum number of hours or miles or dollar amount when calculating a field trip amount. Specifically the formula that T.O.M. uses when calculating the amount to bill a field trip that has a billing rate that has 'STEP RATES' for the instructions is as follows:

Trip Amount	=	Total Driver Amount + Total of 5 Flat Miles
Total Driver Amount	=	Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Each Driver's Cost	=	(Driver's Actual Miles (up to the miles limit) x Billing Rate's Mileage Rate #1) + (Driver's Actual Miles (greater than the miles limit) x Billing Rate's Mileage Rate #2) + (Driver's Actual Hours (up to the hours limit) x Employee's Hourly Rate #1) + (Driver's Actual Hours (greater than the hours limit) x Employee's Hourly Rate #2) + Driver's Employee Expense for the Trip + Customer Amount (entered in the Customer Screen).

> **NOTE:** If the Driver's Actual Miles are less than the Minimum Miles entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Miles by the Mileage Rate rather than the Actual Miles.
>
> If the Driver's Actual Hours are less than the Minimum Hours entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Hours by the Hourly Rate rather than the Actual Hours.
>
> If the Driver's Cost is less than the Minimum Amount entered in the Billing Rate Screen then T.O.M. will use the Minimum Amount for that driver rather than the calculated driver cost.

Let's look at an example of how this formula would work:

Example Field Trip: Field Trip Billing Rate: INDIST   Number of Drivers: 2
Field Trip Customer: Echo Mountain
Flat Amount #1: $50 #2: $20 #3: $0 #4: $0 #5: $0

Driver 1: Kathy Unger	Actual Miles: 35	Actual Hours: 4	Driver Expense: 0
Driver 2: Sandy Werser	Actual Miles: 36	Actual Hours: 4.25	Driver Expense: 35

Example Billing Rate: **Example Customer:**
Billing Rate: INDIST   Customer Name: Echo Mountain
Billing Instructions: STEP RATES   Customer Amount: 0
Mileage Rate#1: $.60   Mileage Step: 0   Mileage Rate #2: $0
Hourly Rate#1: $15.00   Hourly Step: 2   Hourly Rate #2: $20.00
Minimum Miles: 0
Minimum Hours: 2
Minimum Amount: 0

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Step Rates' in the Billing Instructions (continued)

Field Trip Calculation:

Each Driver's Cost   =   (Driver's Actual Miles (up to the miles limit) x Billing Rate's Mileage Rate #1) + (Driver's Actual Miles (greater than the miles limit) x Billing Rate's Mileage Rate #2) + (Driver's Actual Hours (up to the hours limit)   x Billing Rate's Hourly Rate #1) + (Driver's Actual Hours (greater than the miles limit) x Billing Rate's Hourly Rate #2) + Driver's Employee Expense for the Trip + Customer Amount (entered in the Customer Screen).

Kathy Unger's Total Charge = (35 x .6) + (0 x 0) + (2 x 15) + (2 x 20) + 0 + 0 = $91
Sandy Werser's Total Charge = (36 x .6) + (0 x 0) + (2 x 15) + (2.25 x 20) + 35 + 0 = $111.6

Total Driver Amount   =   Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Total Driver Amount   = $91 + $111.6 = $202.6

Trip Amount   =   Total Driver Amount + Total of 5 Flat Miles
Trip Amount   = $202.60 + $50 + $20 + $0 + $0 + $0 = $272.60

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Rate' in the Billing Instructions and You Bill Differently for a driver's Wait Time or Overtime Wait Time

When the billing rate that you assigned to the field trip has a billing instruction of 'RATE' then you are telling T.O.M. that you basically want to multiply the driver's actual hours by an hourly rate and the driver's actual miles by a mileage rate. Both the mileage rate and the hourly rate are entered in the Billing Rate Screen. Further you may enter a Wait Time Rate and an Overtime Wait Time Rate to be multiplied against any wait time or overtime wait time a driver has for a field trip. You may, of course, also add some flat amounts to this calculated amount. You may also instruct T.O.M. to use a minimum number of hours or miles or dollar amount when calculating a field trip amount. Specifically the formula that T.O.M. uses when calculating the amount to bill a field trip that has a billing rate that has 'RATE' for the instructions with a Wait Time Rate is as follows:

Trip Amount	=	Total Driver Amount + Total of 5 Flat Miles
Total Driver Amount	=	Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Each Driver's Cost	=	(Driver's Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours x Employee's Hourly Rate) + (Employee's Wait Time x Billing Rate's Wait Time Hourly Rate) + (Employee's Overtime Wait Time x Billing Rate's Overtime Wait Time Hourly Rate) + Driver's Employee Expense for the Trip + Customer Amount (entered in the Customer Screen).

> **NOTE:** If the Driver's Actual Miles are less than the Minimum Miles entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Miles by the Mileage Rate rather than the Actual Miles.
>
> If the Driver's Actual Hours are less than the Minimum Hours entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Hours by the Hourly Rate rather than the Actual Hours.
>
> If the Driver's Cost is less than the Minimum Amount entered in the Billing Rate Screen then T.O.M. will use the Minimum Amount for that driver rather than the calculated driver cost.

Let's look at an example of how this formula would work:

Example Field Trip: Field Trip Billing Rate: INDIST   Number of Drivers: 2
Field Trip Customer: Echo Mountain
Flat Amount #1: $50 #2: $20 #3: $0 #4: $0 #5: $0

Driver 1: Kathy Unger	Actual Miles: 35	Actual Hours: 3	Driver Expense: 0
	Wait Time: 1	Overtime Wait Time: 0	
Driver 2: Sandy Werser	Actual Miles: 36	Actual Hours: 3.25	Driver Expense: 35
	Wait Time: 1	Overtime Wait Time: 0	

Example Billing Rate: **Example Customer:**
Billing Rate: INDIST   Customer Name: Echo Mountain
Billing Instructions: RATE   Customer Amount: 0
Mileage Rate: $.60
Hourly Rate: $15.00   Wait Time Hourly Rate: $10.00   Overtime Wait Time Hourly Rate: $12.00
Minimum Miles: 0
Minimum Hours: 2
Minimum Amount: 0

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Rate' in the Billing Instructions and You Bill Differently for a Driver's Wait Time (continued)

Field Trip Calculation:

Each Driver's Cost   =   (Driver's Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours
Billing Rate's Hourly Rate)+ (Employee's Wait Time x Billing Rate's Wait Time
Hourly Rate) + (Employee's Overtime Wait Time x Billing Rate's Overtime Wait
Time Hourly Rate) + Driver's Employee Expense for the Trip + Customer Amount
(entered in the Customer Screen).

Kathy Unger's Total Charge = (35 x .6) + (3 x 15) + (1x 10) + (0 x 12) + 0 + 0 = $76
Sandy Werser's Total Charge = (36 x .6) + (3.25 x 15) + (1x 10) + (0 x 12) + 35 + 0 = $115.35

Total Driver Amount   =   Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Total Driver Amount   = $76 + $115.35 = $191.35

Trip Amount   =   Total Driver Amount + Total of 5 Flat Miles
Trip Amount   = $191.35 + $50 + $20 + $0 + $0 + $0 = $261.35

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Employee Rates', 'Employee Rates with OT' or 'Employee Rates with Daily OT' in the Billing Instructions and You Bill Differently for a Driver's Wait Time

When the billing rate that you assigned to the field trip has a billing instruction of 'EMPLOYEE RATES', 'Employee Rates with OT' or 'Employee Rates with Daily OT' then you are telling T.O.M. that you want to multiply the driver's various actual hours and actual miles by one set of the six sets of hourly rates that you specified for each employee in the Employee Screen and mileage rate that you specified in the Billing Rate Screen. Further, your are telling T.O.M. that you want to multiply any wait time or overtime wait time that the employee had for that field trip by one set of the six sets of wait time and overtime wait time rates that you specified for each employee in the Employee Screen. You may, of course, also add some flat amounts to this calculated amount. You may also instruct T.O.M. to use a minimum number of hours or miles or dollar amount when calculating a field trip amount. Specifically the formula that T.O.M. uses when calculating the amount to bill a field trip that has a billing rate that has 'EMPLOYEE RATES' for the instructions is as follows:

Trip Amount	=	Total Driver Amount + Total of 5 Flat Miles
Total Driver Amount	=	Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Each Driver's Cost	=	(Driver's Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours x Employee Hourly Rate (1-6)) + (Employee's Wait Time x Employee's Wait Time Hourly Rate (1-6)) + (Employee's Overtime Wait Time x Employee's Overtime Wait Time Hourly Rate (1-6)) + Driver's Employee Expense for the Trip + Customer Amount (entered in the Customer Screen).

> **NOTE:** If the Driver's Actual Miles are less than the Minimum Miles entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Miles by the Mileage Rate rather than the Actual Miles.
>
> If the Driver's Actual Hours are less than the Minimum Hours entered in the Billing Rate Screen then T.O.M. will multiply the Minimum Hours by the Hourly Rate rather than the Actual Hours.
>
> If the Driver's Cost is less than the Minimum Amount entered in the Billing Rate Screen then T.O.M. will use the Minimum Amount for that driver rather than the calculated driver cost.

Let's look at an example of how this formula would work:

Example Field Trip: Field Trip Billing Rate: INDIST Number of Drivers: 2
Field Trip Customer: Echo Mountain
Flat Amount #1: $50 #2: $20 #3: $0 #4: $0 #5: $0

Driver 1: Kathy Unger	Actual Miles: 35	Actual Hours: 4	Driver Expense: 0	Rate #1: $13
	Wait Time: 1		Overtime Wait Time: 0	
	Wait Time Rate #1: $10.00		Overtime Wait Time Rate #1: $0.00	
Driver 2: Sandy Werser	Actual Miles: 36	Actual Hours: 4.25	Driver Expense: 35	Rate #1: $14.5
	Wait Time: 1		Overtime Wait Time: 0	
	Wait Time Rate #1: $11.00		Overtime Wait Time Rate #1: $0.00	

(continued on next page)

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Employee Rates', 'Employee Rates with OT' or 'Employee Rates with Daily OT' in the Billing Instructions and You Bill Differently for a Driver's Wait Time (**continued**)

Example Billing Rate: **Example Customer:**
Billing Rate: INDIST   Customer Name: Echo Mountain
Billing Instructions: Employee Rate   Customer Amount: 0
                      With OT
Mileage Rate: $.60
Hourly Rate: $15.00   # of Employee Rate to use: 1
Minimum Miles: 0
Minimum Hours: 2
Minimum Amount: 0

Field Trip Calculation:

Each Driver's Cost = (Driver's Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours x
                       Employee's Hourly Rate (1-6))+ (Employee's Wait Time x Employee's Wait Time
                       Hourly Rate (1-6)) + (Employee's Overtime Wait Time x Employee's Overtime
                       Wait Time Hourly Rate (1-6)) + Driver's Employee Expense for the Trip +
                       Customer Amount (entered in the Customer Screen).

Kathy Unger's Total Charge = (35 x .6) + (4 x 13) + (1 x 10) +(0 x 0) + 0 + 0 = $83
Sandy Werser's Total Charge = (36 x .6) + (4.25 x 14.5) + (1 x 11) + (0 x 0) + 35 + 0 = $129.23

Total Driver Amount = Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip
Trip Amount   = Total Driver Amount + Total of 5 Flat Miles
Total Driver Amount = $83 + $129.23 = $212.23
Trip Amount   = $212.23 + $50 + $20 + $0 + $0 + $0 = $282.23

How T.O.M. Calculates the Amount to Bill a Field Trip

If the Billing Rate Has 'Flat Amount' in the Billing Instructions

When the billing rate that you assigned to the field trip has a billing instruction of 'FLAT AMOUNT' then you are telling T.O.M. that you simply want to charge the customer the total of the five flat amounts in the Trip Billing Section. You are also telling T.O.M. to ignore all miles and hours logged for the field trip as well as employee expenses and customer amounts. Specifically the formula that T.O.M. uses when calculating the amount to bill a field trip that has a billing rate that has 'FLAT AMOUNT' for the instructions is as follows:

Trip Amount   =   Total of 5 Flat Miles

Let's look at an example of how this formula would work:

Example Field Trip: Field Trip Billing Rate: INDIST   Number of Drivers: 2
                                          Field Trip Customer: Echo Mountain
                                          Flat Amount #1: $50 #2: $20 #3: $0 #4: $0 #5: $0

Driver 1: Kathy Unger   Actual Miles: 35   Actual Hours: 2   Driver Expense: 0
Driver 2: Sandy Werser   Actual Miles: 36   Actual Hours: 1.75   Driver Expense: 35

Example Billing Rate: **Example Customer:**
Billing Rate: INDIST   Customer Name: Echo Mountain
Billing Instructions: RATE   Customer Amount: 0
Mileage Rate: $.60
Hourly Rate: $15.00
Minimum Miles: 0
Minimum Hours: 2
Minimum Amount: 0

Field Trip Calculation:

Trip Amount   =   Total of 5 Flat Miles
Trip Amount   = $50 + $20 + $0 + $0 + $0 = $70

How Do I Bill a Single Field Trip Using T.O.M.?

Billing a single field trip with T.O.M. is literally clicking one button. Just retrieve the field trip and click the Bill Trip button. After clicking the Bill Trip button (Figure 5-15) T.O.M. will calculate the amount that the field trip is to be billed, log the amount the field trip was billed and print the field trip invoice. The following is a detailed discussion of the steps you take when billing a single field trip using T.O.M.:

1. Retrieve the field trip you wish to bill by using the Field Trip Search Selection screen.

2. Click the Bill Trip button (Figure 5-15).

Figure 5-15. The Bill Trip Button

Click the Bill Trip button to bill only this field trip.

This will cause T.O.M. to:

a)   Calculate the amount to bill the customer for the field trip.

b)   Log a Money Activity record for the field trip for the amount billed (for more information on Money Activity Record see *Chapter 6 - Entering Field Trip Payments and Other Money Activities* later in this manual).

c)   Ask you if you wish to print a Field Trip Invoice or Statement for the field trip. See *Reprinting a Field Trip Invoice for a Single Field Trip* later in this chapter for details about using this screen.

d)   Mark the field trip as *Billed* so that it will not be accidentally billed again.

e)   Log the date the field trip was billed for later reporting purposes.

f)   Change the Bill Trip button to read 'Print Bill' (Figure 5-16).

g)   Display the word 'Billed' and the date the field trip was billed on the main field trip screen (Figure 5-16)

The Bill Trip button is changed to say 'Print Bill' to prevent you from accidentally re-billing the field trip.

The word 'Billed' and the date that the field trip was billed is displayed on the screen.

Figure 5-16. Field Trip Main Screen AFTER the Field Trip Was Billed

Correcting Mistakes AFTER You Have Billed Your Field Trip

Mistakes happen even to the best of us.   Gecko understands this and has T.O.M. to be flexible and forgiving of mistakes. When you bill a field trip T.O.M. performs the following steps:

1. Calculates the amount to bill the field trip.
2. Creates / prints an invoice.
3. Creates a record in the Accounts Receivable A/R (Bills & Payments) file for that field trip.
4. Marks the Trip as *Billed*.

What happens if after you billed the trip you realized that something was wrong that after all this has happened?

No problem. T.O.M. makes it easy to correct mistakes AFTER you have billed your field trip. Just perform the following steps:

1. Correct the wrong information (such as the driver miles, hours, billing rate, flat charges etc.)
2. Save the field trip.
3. T.O.M. will automatically detect that the field trip has already been billed and that you have changed information that will affect the amount the field trip should be billed and automatically notify you that the amount in the A/R (Bills & Payments) file for this field trip should be recalculated to reflect this change (Figure 5. 17). Just click OK on this screen and T.O.M. will automatically recalculate the trip's charge amount and update the trips A/R (Billed) balance.
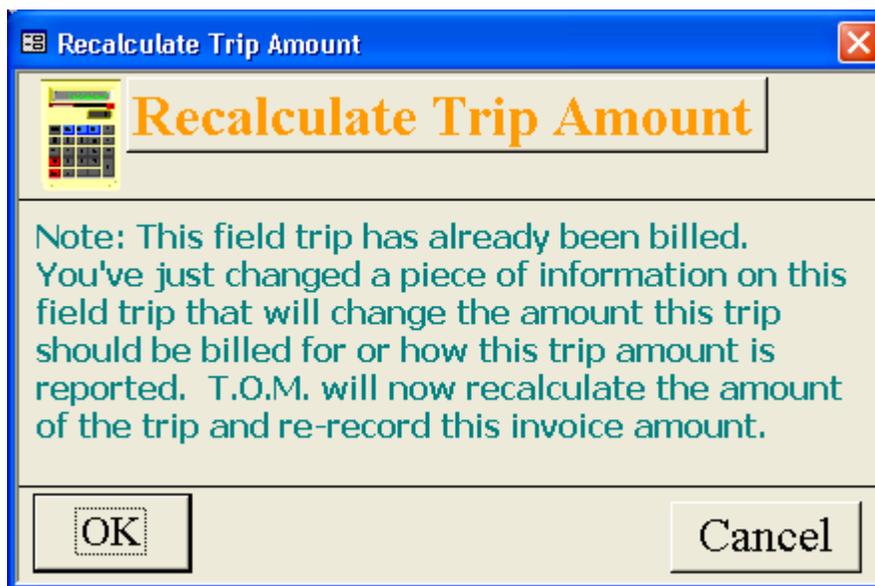

Figure 5. 17 – T.O.M.'s Recalculate Trip Amount Screen that Automatically Displays When You Change the Information that Will Affect that A BILLED Trip Should have Been Charged.

NOTE: If you click the Cancel button on this screen T.O.M. will NOT change the amount of the field trip's A/R (Billed) amount. This could cause your T.O.M. reports to not match any reprinted invoices. This is because if you did NOT allow T.O.M. to recalculate the trip's A/R (Bill) amount and did reprint the invoice – the invoice will reflect the changes made but the Trip's A/R (Bill) amount used by your management reports will not.

Reprinting a Field Trip Invoice for a Single Field Trip

Sometimes you need another copy of the Field Trip Invoice printed even though T.O.M. automatically prints a Field Trip Invoice when you bill a field trip. For example, your customer may misplace their Field Trip Invoice. Or you may need a copy of the invoice for your own records.

It's no problem with T.O.M. You can reprint your Field Trip Invoice for a single billed trip as many times as you need. If you remember when you billed a field trip the Bill Trip button changed to say 'Print Bill'. By pressing this button you can reprint the Field Trip Invoice. The following is a detailed discussion on the steps you take to reprint a Field Trip Invoice:

1. Retrieve the field trip that requires you to reprint an invoice by using the Field Trip Search / Selection screen.

2. Click the Print Bill button (Figure 5-18). This will cause the Please Select Report screen to display.

Figure 5-18. The Print Bill Button Can Be Used to Reprint a Field Trip Invoice

3. The Please Select Report screen (Figure 5-19) gives you the choice to either print a Field Trip Invoice or a Field Trip Statement, as follows:
    *   The Field Trip Statement is a report that lists a summary of financial activity for the field trip.

- The Field Trip Invoice is the actual bill for the field trip.

You select which report to print by clicking the button with the report name DOWN and then clicking the Print button. To print the Field Trip Invoice click the Reprint Invoice button down and click the Print button. T.O.M. will then print the Field Trip Invoice for that field trip. In other words, when you click the Print button T.O.M. will print the report indicated by which button that is clicked down.


> Click this button down to instruct T.O.M. to reprint the Field Trip Invoice (shown clicked down)

> Click this button down to instruct T.O.M. to reprint the Field Trip Statement.

> Click this button when you have selected the report you desire.
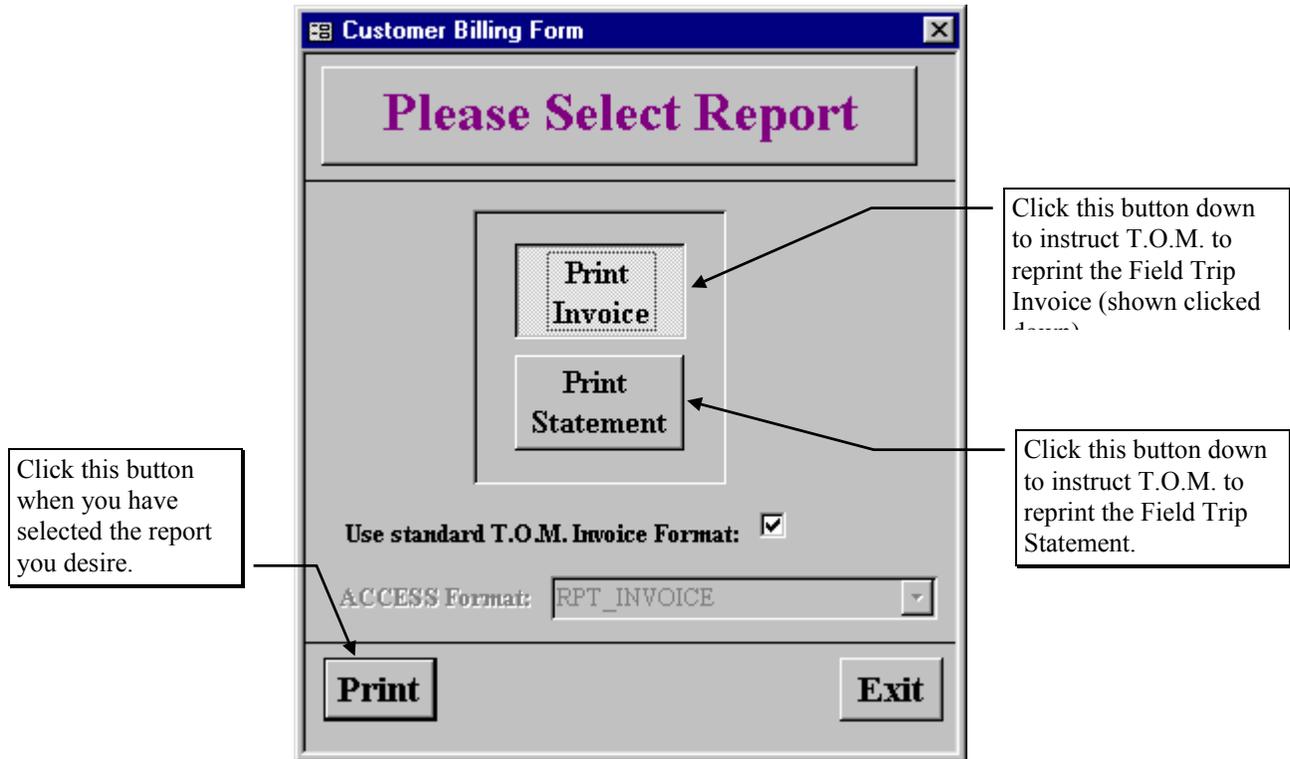
Figure 5-19. The Please Select Report Screen

Use Standard T.O.M. Invoice Format: This is a check box that you may either check or uncheck. If you check this field you are telling T.O.M. to automatically use the regular invoice format. If you uncheck this field you can use a custom invoice format that you have stored in the MS Access database TRIPRPT.MDB. This report is selected using the ACCESS format drop-down list as described below. See *Appendix D – Using MS Access to Customize T.O.M. Reports* in this manual for details about customizing your own reports.

ACCESS Format: If you uncheck the Use Standard T.O.M. Invoice Format checkbox as described above, you can click the drop-down arrow and select from any of the available formats. See *Appendix D – Using MS Access to Customize T.O.M. Reports* in this manual for details about customizing your own reports.

Printing a Field Trip Statement

Occasionally, you will need to make adjustments to the amount of money that a customer owes for a field trip. This is done by entering a Money Activity record against the field trip (this is explained in detail in Chapter 6 - 'Entering Payments and Other Money Activity'). When entering other money activities you may need to print a statement to the customer indicating the change that was made to the balance of the amount owed for the field trip. The Field Trip Statement Report is that report. This report prints a

summary list of all financial activity concerning the field trip. For example, it may show that a field trip was billed for $113.50 on 1/15/96 then the field trip's balance was adjusted by -$50.00 on 1/30/96 leaving a final balance owed of $63.50.

To print a Field Trip Statement report you follow the exact detailed procedures described in the previous section of this chapter titled *Reprinting A Field Trip Invoice*. On step 3, however, you would click the Print Statement button and then click the Print button.

Billing A Group of Field Trips

Different school districts have different ways that they prefer to bill their field trips. Some districts prefer to save the drivers' trip tickets with the actual miles and hours and then enter them in as a group and bill each field trip as they go. Other districts prefer to enter the driver's miles and hours as they receive them but to bill at a later time in a group of field trips (all field trips for a month for example). Fortunately, T.O.M. was designed to accommodate both methods of billing. We have already discussed how to bill an individual field trip earlier in this chapter. Now, we are going to discuss T.O.M.'s Mass Billing feature that allows you to bill groups of field trips with just one click of a button.

To use the Mass Billing feature open the Process menu, then click Billing and then Mass Billing (Figure 5-20). The Mass Billing Warning screen will appear (Figure 5-21).
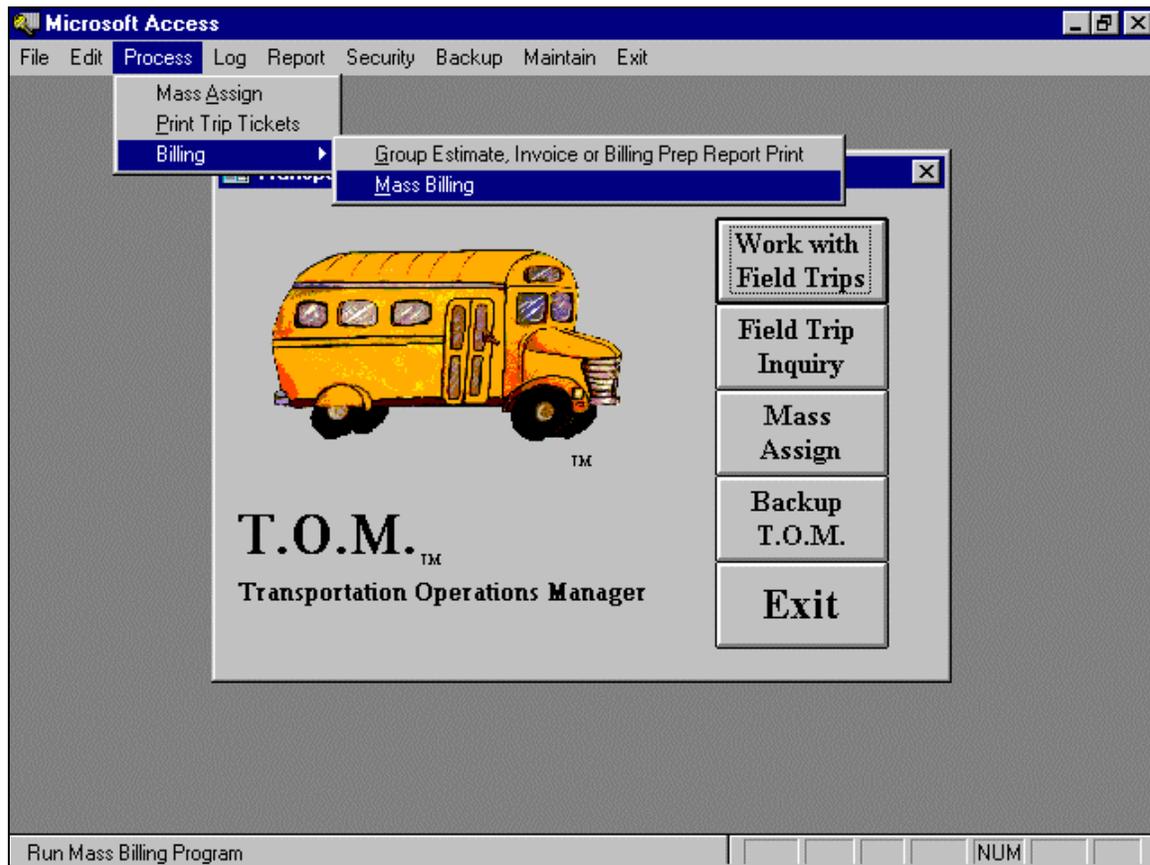

Figure 5-20. Starting the Mass Billing Feature

The Mass Billing process is a fairly intensive one. As such it requires that the person running this process be THE ONLY USER IN T.O.M. Before you run the Mass Billing Process ensure that no other person is using T.O.M. **NOTE:** It's okay if schools are using the school version of T.O.M. while you are running the Mass Billing Process. Because the school version of T.O.M. does not allow the user to actually change any of the field trip information, they cannot disrupt the Mass Billing process. However, any regular T.O.M. user should sign off of the T.O.M. system while the Mass Assign Process is running.

Click the OK button to continue.
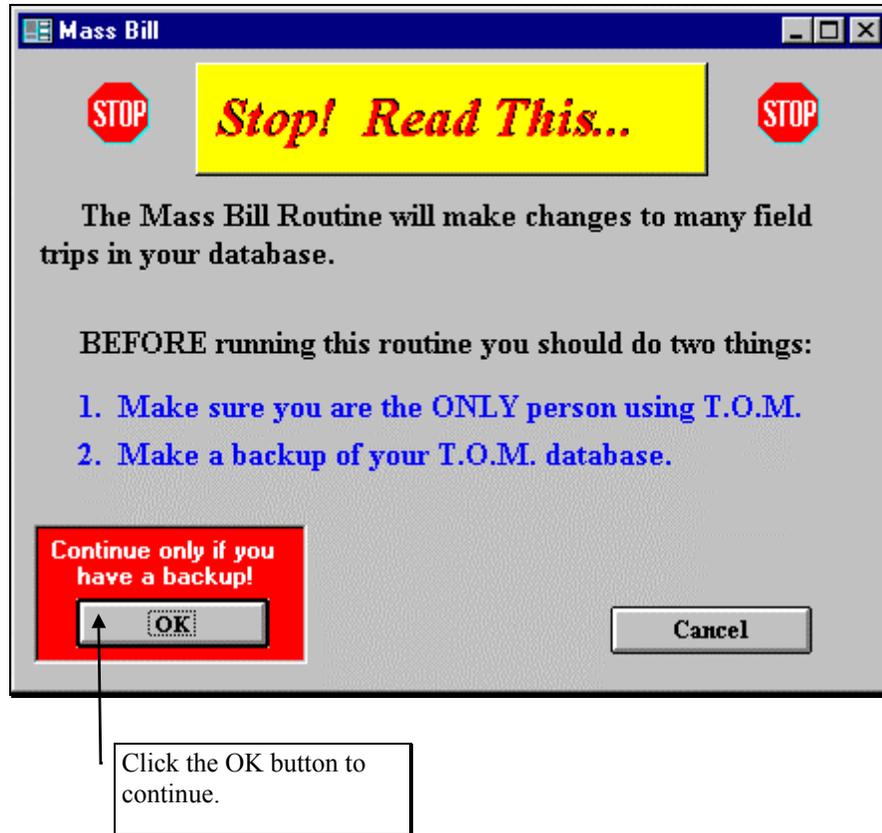
Figure 5-21. Mass Billing Warning Screen

The Mass Billing process will make many changes to your database. As such it is a very good idea to back up your T.O.M. database BEFORE you run the Mass Billing process. For more information about backing up your T.O.M. Database see *Chapter 10 - Backing Up and Restoring* later in this manual.

When you are ready to proceed to the Mass Billing screen click the OK button on the Mass Billing Warning screen (Figure 5-21) and the Mass Billing screen will display (Figure 5-22).

Billing Unbilled Field Trips

Follow these steps to bill a group of field trips from the Mass Billing screen (Figure 5-22):

1. Specify the search parameters of your group billing. (See the sections below for details about entering search and sort criteria for each tab on the Mass Billing screen.)
2. Click the Find All button.
3. Verify that the list of unbilled field trips that matched your search parameters is correct.
4. Click the Bill All button.

That's all that is required to have T.O.M. automatically bill a group of field trips. When T.O.M. bills each field trip T.O.M. performs the following tasks:

1. Calculate the amount to bill the customer for the field trip.
2. Log a Money Activity record for the field trip for the amount billed. (For more information on Money Activity Record see *Chapter 6 - Entering Field Trip Payments and Other Money Activities*.)
3. Print a Field Trip Invoice for the field trip (optional).

4. Mark the field trip as *Billed* so that it will not be accidentally billed again.
5. Log the date the field trip was billed for later reporting purposes.

Use the tab sections to choose from a variety of search and sort options. The parameters tell T.O.M. what unbilled field trips you want to find in the search.

Number of unbilled field trips found in the search.

Mass Billing

Mass Billing of Field Trips   Number of trips selected: 543

| Dates and General | Assignment | Billing | Other | Sorting |

Departure Date Range: From: [   ] To: [   ] Dates: [   ]

Customer: [   ] [   ]

Destination: [   ] [   ]   Print Invoices: ☑

Trip#	Customer	Destination	Dept. Date	Billed	Canceled	Assi
10259	FOOTHILLS ELEM.	DEER VALLEY AIRPORT	2/16/00	No	No	No
9624	GOLD DUST ELEM.	PIONEER VILLAGE	12/17/99	No	No	Yes
9531	GOLD DUST ELEM.	Desert Center at Pinnacle Peak	4/6/00	No	No	No
9479	GOLD DUST ELEM.	ARIZONA STATE CAPITAL	2/9/00	No	No	No
9408	GOLD DUST ELEM.	HEARD MUSEUM	4/26/00	No	No	No
9407	GOLD DUST ELEM.	HEARD MUSEUM	4/25/00	No	No	No
9678	DESERT SHADOWS MIDDLE	ARIZONA STATE UNIVERSITY	1/13/00	No	No	Yes
9055	GOLD DUST ELEM.	CROW AGRICULTURAL FACILITY	2/25/00	No	No	No
9433	GREENWAY MIDDLE	GranCare Center	12/9/99	No	No	Yes
10196	FOOTHILLS ELEM.	UNION HALL	2/3/00	No	No	No
9994	FOOTHILLS ELEM.	PHOENIX ZOO	4/26/00	No	No	No

Find All   **Bill All**   Exit

All unbilled field trips that have been found in the search are displayed in this list.

If Print Invoices is checked all field trips billed in the mass billing process will have an invoice print. If unchecked no invoices will print.

Click the Bill All button to bill all the selected unbilled field trips.

Click the Find All button after you have finished entering your search parameters on each of the tabs near the top of this screen. T.O.M. searches the database and displays all the field trips that match the search parameters.

Figure 5-22. The Mass Billing Screen

When you click the Find All button T.O.M. will locate all field trips that match your search parameters that are NOT BILLED and that have the Allow Trip To Be Billed field in the Billing Section of the Detailed

Field Trip Screen checked. If the field trip is already billed or has the Allow Trip To Be Billed field unchecked it will NOT show up a list of field trips even if it otherwise matches your search parameters.

Searching and Sorting Unbilled Field Trips

The searching and sorting features of the Mass Billing screen (Figure 5-22) is very powerful, but very easy to use. To search your unbilled field trips just enter your search parameters and click the Find All button. In a few moments T.O.M. will display in the selected records box all the Field Trip records that matched your search parameters. The records will be sorted according to the sorting and lookup options you choose. Let's take a closer look at how use the searching feature of this screen. Figure 5-22 shows the key search portions of the Mass Billing screen.

The screen uses a 'Tabbed' format. That is, the information on this portion of the screen is grouped into different sections that you can display by clicking on that group's tab. Below is a discussion of each field in each group of the search and sort portion of the screen.

Entering Search Criteria on the Dates and General Tab

This section describes the search fields in the Dates and General tab on the Mass Billing screen (Figure 5-23).

Departure Date Range: You can use the preprogrammed date ranges found in the Dates field drop-down list or enter your own date ranges. If you use the preprogrammed date ranges, click on the Dates field drop-down arrow and select from one of 12 date ranges, such as 'Today', 'This Week', 'Last Year' etc. The date ranges are automatically filled in for you.

If you enter your own date ranges, use these fields to search your field trips by their departure date. T.O.M. makes it easy for you to key in any date. Rather than having to type in a "/" or a"-" when typing in the date, T.O.M. automatically places a "/" between the Month, Day and Year (this is called 'masking'). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of "3/2/1994" you would enter "03021994" and T.O.M. would automatically place two "/" in the appropriate positions in the date. The year must be entered as the full year (ex. "2000" not "00"). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen click on the little button next to this date field that looks like a small calendar. See *Appendix C - The Pop Up Calendar and Time Entry Screens* in the *T.O.M. Getting Started Manual* for more details.

NOTE: You can combine search parameters for more exact searches. For example, you could enter a departure date range and a destination to get only unbilled field trips made for that destination for that date range. The following is a description of each of the search parameters that T.O.M. allows you to use when searching for unbilled field trips.

Customer: You may select a specific customer to search your field trips by. For example, you would use this to search for all field trips for a particular school. If you know the number of the customer then enter it here. Don't worry if you don't know the customer number. T.O.M. gives you an easy way to look up your customer by the customer name. To do this you click the Customer button. This causes the Custom Search Screen to appear. This screen will allow you to quickly search your existing customers by an alphabetic lookup. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Guide* for details about searching for customers.

Figure 5-23. The Dates and General Tab on the Mass Billing Screen

Destination: You may select a specific destination to search your Field Trips by. For example, you may search all field trips requests for the city zoo. If you know the number of the destination of the field trip then enter it here. If you don't know the destination number, T.O.M. will provide an easy way to look up your destination by the destination name (or description). To do this you click the Destination button. This causes the Destination Search Screen to appear. This screen will allow you to quickly search your existing destination by an alphabetic lookup. See *Chapter 8 – Destinations* in the *T.O.M. Getting Started Guide* for details about searching for destinations.

Print Invoices: This field is a check box field which means it is either checked or unchecked. If this field is checked you are telling T.O.M. to print a field trip invoice for each unbilled field trip that is selected to be billed in the mass billing job that you run when you click the Bill All button. If this field is unchecked you are telling T.O.M. to bill the selected field trips but do NOT print the field trip invoices at this time for those field trips that are billed. **NOTE:** You may always print the invoices for the selected field trips at a later time using the Group Estimate / Invoice / Billing Prep Report Print Routine which is described later in this chapter.

Entering Search Criteria on the Assignment Tab

This section describes the search fields in the Assignment tab on the Detailed Field screen (Figure 5-24).
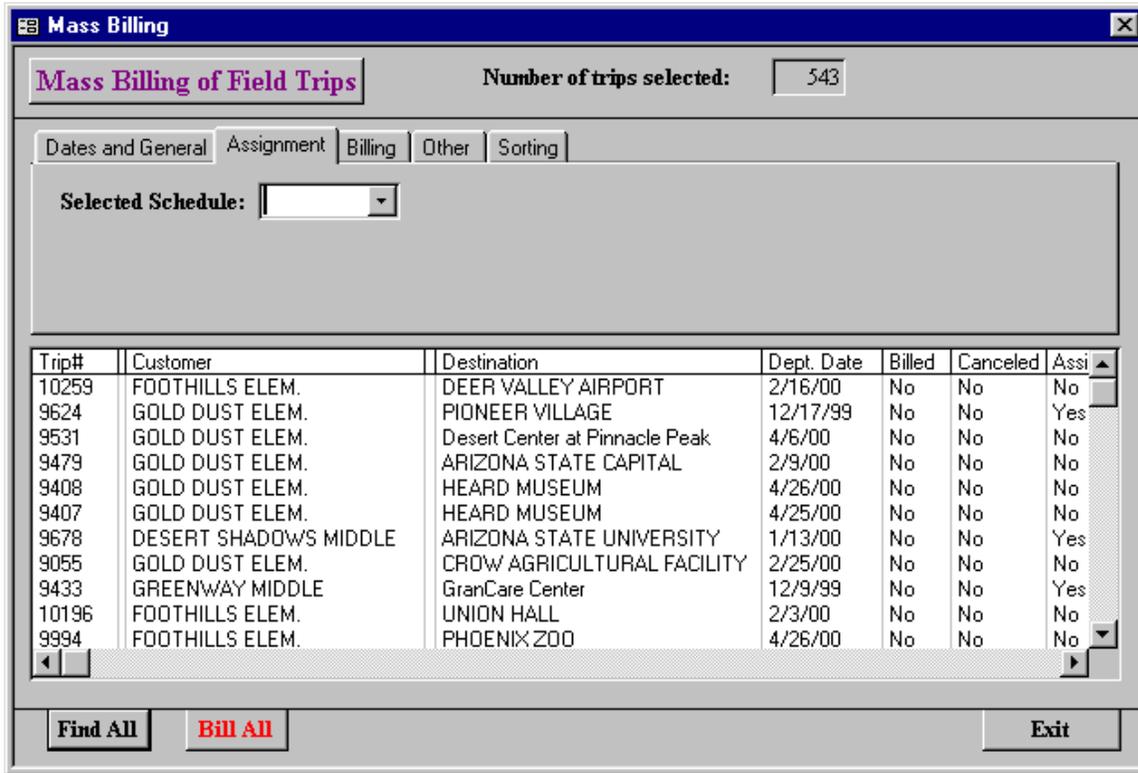
Figure 5-24. The Assignment Tab on the Mass Billing Screen

Selected Schedule: A schedule is a list of drivers that you create when you first set up T.O.M. When a field trip is added to the field trip database you assign a schedule to that field trip. You may then search the field trip database for all field trips with a specific schedule. Click on the down arrow to the right of the Schedule field to see a list of schedules that your transportation department has created. Once you find the schedule you desire click on it and it will automatically appear in the Schedule field. **NOTE:** T.O.M. will only search the field trips on their FIRST schedule. It will not search their other four schedules to see if they match the selected schedule entered here.

Entering Search Criteria on the Billing Tab

This section describes the search fields in the Billing tab on the Detailed Field screen (Figure 5-25).

Figure 5-25. The Billing Section on the Mass Billing Screen

Fund: You may select a specific fund that the field trip is charged against. This field is a drop down list box. If you don't know the number of the fund that you want to charge a field trip against click the down arrow next to the fund box. A list of all the funds you entered when setting up T.O.M. will appear. Simply locate the desired fund, point to it with your mouse and click. T.O.M. will automatically place the selected fund into the fund box.

If you know the number of the fund that is requesting the field trip then enter it here. Don't worry if you don't know the fund number. T.O.M. gives you an easy way to lookup your fund by the fund name. To do this you click the Fund button. This causes the Fund Search Screen to appear. This screen will allow you to quickly search your existing funds by an alphabetical lookup. See *Chapter 3 – Entering Lookup Lists* in the *T.O.M. Getting Started Guide* for details about searching for funds.

Billing Customer: This allows you to search by the customer who received the bill if it was different than the customer who took the field trip. If you know the number of the customer then enter it here. Don't worry if you don't know the customer number. T.O.M. gives you an easy way to lookup your customer by the customer name. To do this you click the Billing Customer button. This causes the Customer Search Screen to appear. This screen will allow you to quickly search for the billing customer by an alphabetical lookup. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Guide* for details about searching for customers.

Entering Search Criteria on the Other Tab

This section describes the search fields in the Other tab on the Detailed Field screen
(Figure 5-26).

Figure 5-26. The Other Section on the Mass Billing Screen

Selected Category: A field trip may be assigned a category code defined by you. These codes can be used
to group similar field trips (for example, boys basketball). You may then search the field trip database for
field trips with a specific category. Click on the down arrow to the right of the Category field to see a list
of Categories that you created when you first setup T.O.M. Once you find the Category you desire click on
it and it will automatically appear in the Category field

Select Division: Customers can be assigned to divisions. You may then search field trips by division. If
you know the division that you wish to search by then enter here. If you don't know the division you
desire T.O.M. provides you with an easy *drop down list* of all of the divisions that you have created. Just
click the down arrow to the right of the Division field and a list of existing divisions will display on your
screen. To select a division click on the row containing the desired division and that division will
automatically appear in the Select Division field.

Selected Grade: You may search your field trips by the student grade level that you assigned to the trips.
Click on the down arrow to the right of the grade field to see a list of grades that you may select. Once you
find the grade you desire click on it and it will automatically appear in the grade field.

Entering Sort Criteria on the Sorting Tab

This section describes the sort and ordering fields you can use in the Sorting and Lookup tab on the Detailed Field screen (Figure 5-27).

Sort by #1: This is the primary sort field. T.O.M. will use this field to sort first. Click on the drop down arrow to select the field by which to sort. You can sort this field in Ascending or Descending order, which is specified in the Order By # 1 field.

Sort by #2: This is the secondary sort field. T.O.M. will use this field to sort second within the results of the Sort by #1 field. Click on the drop down arrow to select the field by which to sort. You can sort this field in Ascending or Descending order, which is specified in the Order By # 2 field.

Sort by #3: This is the third sort field. T.O.M. will use this field to sort third within the results of the Sort by #2 field. Click on the drop down arrow to select the field by which to sort. You can sort this field in Ascending or Descending order, which is specified in the Order By # 3 field.

Order by #1: Sorts the results of the Sort by #1 field in either Ascending or Descending order. Click the drop down arrow to choose the sort order.

Order by #2: Sorts the results of the Sort by #2 field in either Ascending or Descending order. Click the drop down arrow to choose the sort order.

Order by #3: Sorts the results of the Sort by #3 field in either Ascending or Descending order. Click the drop down arrow to choose the sort order.

Use Standard T.O.M. Invoice Format: T.O.M. allows you to use Microsoft Access 97 to customize many of T.O.M.'s reports. One of these reports is the Field Trip Invoice. This is a check box that you may either check or uncheck. If you check this field you are telling T.O.M. to automatically use the regular invoice format. If you uncheck this field you can use a custom invoice format that you have stored in the MS Access database TRIPRPT.MDB. This report is selected using the ACCESS format drop-down list as described below. See *Appendix D – Using MS Access to Customize T.O.M. Reports* in this manual for details about customizing your own reports.

ACCESS Format: If you uncheck the Use Standard T.O.M. Invoice Format checkbox as described above, you can click the drop-down arrow and select from any of the available formats. See *Appendix D – Using MS Access to Customize T.O.M. Reports* in this manual for details about customizing your own reports.

Figure 5-27. The Sorting and Lookup Section on the Mass Billing Screen

Using the Group Estimate, Invoice or Billing Preparation Report Routine

Many districts and private contractors need to perform billing and estimating *in mass* or in large groups of field trips. T.O.M. facilitates this by allowing you to perform mass billing. T.O.M. also allows you to print your field trip estimates and field trip invoices for a group of field trips rather than one at a time. While billing large groups of field trip there is a need for a preparation report before billing is performed. A report that allows you to quickly review how each field trip in a group of field trips will be billed. T.O.M. offers you that report as well called the Billing Preparation Report. All three of these functions are performed in one routine called the Group Estimate, Invoice or Billing Preparation Report Routine.

To use the Group Estimate, Invoice or Billing Preparation Report Routine open the Process menu, then click Billing and then Group Estimate, Invoice or Billing Preparation Report Print (Figure 5-28).
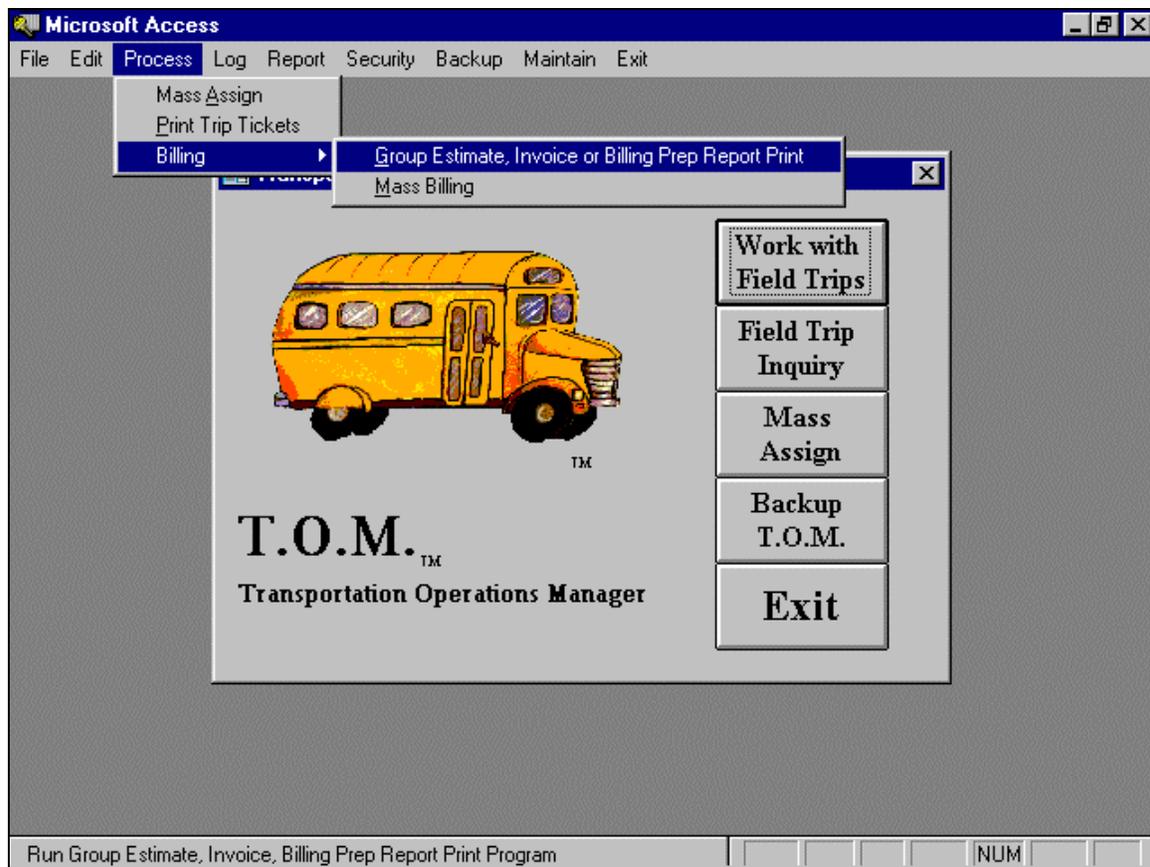

Figure 5-28. Starting The Group Estimate, Invoice, Billing Preparation Report Print Routine

The Group Estimate, Invoice, or Billing Preparation Report screen is displayed (Figure 5-29). This screen gives you both a very powerful field trip searching function as well as the ability to print Estimates, Invoices and a Billing Preparation Report.

To use the Group Estimate, Invoice, or Billing Preparation Report screen you would perform the following steps:

1. Specify the search parameters of the group you wish to print. (See *Searching and Sorting Unbilled Field Trips* later in this chapter for details about entering search and sort/print criteria for each tab on the Group Estimate, Invoice and Billing Preparation Report Print screen.)
2. Click the Find All button.
3. Verify that the list of field trips that matched your search parameters is correct.
4. Click the Print Invoices, Print Estimates or the Print Billing Prep Report buttons to print the report(s) that you desire.

Use the tab sections to choose from a variety of search and sort options. The parameters tell T.O.M. what unbilled field trips you want to find in the search.

Number of field trips found in the search.

Print Invoices, Estimates, Billing Preparation Report

Print Estimate / Invoice / Billing Prep Report   Number of trips selected: 5702

| Dates and General | Assignment | Billing | Other | Sorting / Printing |

Departure Date Range: **From:** [ ]   **To:** [ ]   **Dates:** [ ]

Customer: [ ]   **Selected Trip#:** [ ]

Destination: [ ]   **Trip# range:** [ ]   **To:** [ ]

All field trips that have been found in the search are displayed in this list.

Trip#	Customer	Destination	Departure	Billed	Canceled	Assi
6926	ECHO MOUNTAIN ELEM.	CROW AGRICULTURAL FACILITY	11/6/98	Yes	No	Yes
5919	ECHO MOUNTAIN ELEM.	SHADOW MOUNTAIN HIGH SCHO(	3/24/98	Yes	No	Yes
6196	ECHO MOUNTAIN ELEM.	SUNRISE MIDDLE SCHOOL	3/18/98	Yes	No	Yes
6231	ECHO MOUNTAIN ELEM.	ROCKIN R RANCH	4/2/98	Yes	No	Yes
6232	ECHO MOUNTAIN ELEM.	ROCKIN R RANCH	4/6/98	Yes	No	Yes
6265	ECHO MOUNTAIN ELEM.	WILDLIFE WORLD ZOO	4/21/98	Yes	No	Yes
6294	ECHO MOUNTAIN ELEM.	CASTLES AND COASTERS	5/7/98	Yes	No	Yes
6334	ECHO MOUNTAIN ELEM	VISTA VERDE MIDDLE SCHOOL	5/4/98	Yes	No	Yes
6923	ECHO MOUNTAIN ELEM.	FLEISCHER MUSEUM	10/14/98	Yes	No	Yes
7358	ECHO MOUNTAIN ELEM.	DESERT DISCOVERY CENTER	1/13/99	Yes	No	Yes

| Find All | Print Invoices | Print Estimates | Print Billing Prep Report | Exit |

Figure 5-29. The Group Estimate, Invoice and Billing Preparation Report Print Screen

Click the Find All button after you have finished entering your search parameters on each of the tabs near the top of this screen. T.O.M. searches the database and displays all the field trips that match the search parameters.

Click the Print Invoices button to print an invoice for all trips in the search list.

Click the Print Estimates button to print an estimate for all trips in the search list.

Click the Print Billing Prep Report button to print the Billing preparation report that will include all field trips in the search list.

Printing Invoices for a Group of Field Trips

Many times your district may need to print or reprint invoices for a group of field trips. In fact, some districts need the ability to print invoices BEFORE they actually bill the field trips. T.O.M.'s group invoice print feature handles all of these features. You may ask 'How can T.O.M. print an invoice BEFORE a field trip has been billed?'. For unbilled field trips T.O.M. calculates the invoice amount for the field trip without billing the field trip. T.O.M. allows you to print or reprint invoices for billed field trips as well.

To print invoices for a group of field trips perform the following steps:

1. Specify the search parameters of the group you wish to print.
2. Click the Find All button.
3. Verify that the list of field trips that matched your search parameters is correct.
4. Click the Print Invoices button to print invoices for the field trips you have selected.

T.O.M. allows you to print / reprint an invoice for a single field trip. (See *Reprinting the Invoice of A Single Trip* earlier in this chapter for details.) T.O.M. also allows you some flexibility on how your invoice will print. For information about how to change the appearance of your invoice see *Chapter 4 - District Options* in the *T.O.M. Getting Started Manual*.

Printing Estimates for a Group of Field Trips

Many times your district may need to print or reprint estimates for a group of field trips. T.O.M.'s group estimate print feature handles all of these features. T.O.M. allows you to print estimates for both billed and unbilled field trips. You may ask 'How can T.O.M. print an estimate AFTER a field trip has been billed?'. T.O.M. simply uses estimate miles and hours when appropriate to calculate the estimated amount rather than actual miles and hours. For those districts using employee hourly billing rates T.O.M. will also use the estimated billing rate in the billing rate screen rather than the employee's actual billing rate when printing an estimate for a billed field trip.

To print estimates for a group of field trips perform the following steps:

1. Specify the search parameters of the group you wish to print.
2. Click the Find All button.
3. Verify that the list of field trips that matched your search parameters is correct.
4. Click the Print Estimates button to print estimates for the field trips you have selected.

T.O.M. allows you to print / reprint an estimate for a single field trip. (See *Printing Field Trip Estimates for Customers* in *Chapter 1 – Entering Field Trips, Printing Estimates and Using the Field trip Inquiry* later in this manual for details.) T.O.M. also allows you some flexibility on how your estimates will print. For information about how to change the appearance of your estimate see *Chapter 4 - District Options* in the *T.O.M. Getting Started Manual*.

Printing the Billing Preparation Report for a Group of Field Trips

When billing a group of field trips at the same time you will probably want to verify that everything is correct for those field trips. You want to ensure that the billing rates are correct, the flat amounts are correct, the actual miles and hours are correct. This is a lot of work! Especially if you have to retrieve each and every field trip you want to bill and one at a time look at all of that information. Fortunately, T.O.M. has an answer: the Billing Preparation Report (Figure 5-31). This report has everything you need in one easy to read printout to make sure that your field trips are billed right.

To print the Billing Preparation Report for a group of field trips perform the following steps:

1. Specify the search parameters of the group you wish to print.
2. Click the Find All button.
3. Verify that the list of field trips that matched your search parameters is correct.
4. Click the Print Billing Prep Report button to print the Billing Preparation Report (Figure 5-31) for the field trips you have selected.
5. T.O.M. compiles the report (this may take a few minutes, depending on the number of field trips) and then displays the Billing Preparation Report Print / Preview screen (Figure 5-30).
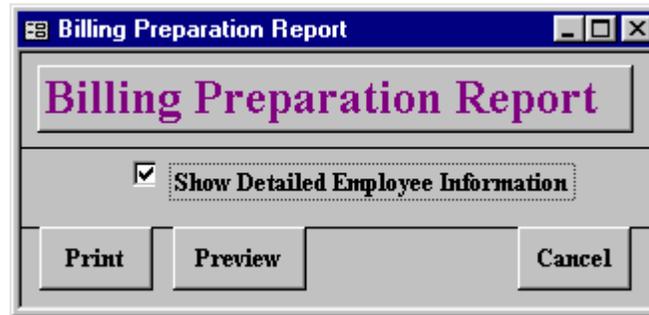
Figure 5-30. Billing Preparation Report Print / Preview Screen

The Billing Preparation Report Print / Preview screen allows you to either print the report on your printer or to preview the report on the screen. You also have the option to show in detail how the amount billed for each employee is calculated. If the Show Detailed Employee Information checkbox is checked the employee detail section will print for each field trip. If this field is unchecked the employee detail section will not print.

The Billing Preparation Report is somewhat *busy* with a lot of numbers. This can be confusing the first time you see the report. However, you will soon find that the report is designed well and includes everything you need to know to find out how and WHY your field trips will be billed. To help you use this report

The General Field Trip Section of the Billing Preparation Report
Continued

Total Emp. Exp.: This is the total of all of the driver's expenses entered for each driver assigned to the field trip in the Trip Driver Information screen.

Total Amount: This is the actual amount that the customer will be charged for the field trip.

LINE 4
# of Hours @ Rate1: If you are using a billing rate with the Billing Instructions of 'Step Rates' then this number is the number of hours that will be billed at the first of the two hourly rates for the step rate. Depending on what the hours limit is in your step billing rate this number may or may not be the same as the Total Hours field found in line 1. If your field trip is using a billing rate that has a Billing Instructions NOT set to 'Step Rates' then this number will simple be the same as the Total Hours.

Hourly Rate #2: If you are using a billing rate with the Billing Instructions of 'Step Rates' then this number is the second of two hourly rates that you may enter for the step rate. T.O.M. will calculate how many hours exceeded the *step hours limit* and multiply those hours by this second hourly rate. For example you may have a step billing rate that tells T.O.M. to bill the first 2 hours at $12/ hour and then all hours after that at $15. So if a driver logged 4 hours for a trip using this rate T.O.M. would bill 2 hours at this Hourly Rate #2 ($15).

Total Wait Hours: This is Wait Hours that was either calculated by T.O.M. using the times entered for a particular employee or the hours that a user keyed directly into the Wait Time field in the Trip Employee Screen.

Wait Hrly Rate: This is the hourly rate that is multiplied against the wait hours for the employee. This hourly rate is either found in Billing Rates screen or the Employee Screen. The Billing Rates special instructions tell T.O.M. which Wait Hourly Rate to use for a field trip.

Total Wait Amt: This is the dollar amount charged for a driver's wait time for a field trip. It is calculated by multiplying the driver's wait time by the wait hourly rate.

LINE 5

# of Miles @ Rate1: If you are using a billing rate with the Billing Instructions of 'Step Rates' then this number is the number of miles that will be billed at the first of the two mileage rates for the step rate. Depending on what the miles limit is in your step billing rate this number may or may not be the same as the Total Miles field found in line 1. If your field trip is using a billing rate that has a Billing Instructions NOT set to 'Step Rates' then this number will simple be the same as the Total Miles.

Mileage Rate #2: If you are using a billing rate with the Billing Instructions of 'Step Rates' then this number is the second of two mileage rates that you may enter for the step rate. T.O.M. will calculate how many miles exceeded the *step miles limit* and multiply those miles by this second hourly rate. For example you may have a step billing rate that tells T.O.M. to bill the first 30 miles at $.05/ hour and then all miles after that at $1. So if a driver logged 40 miles for a trip using this rate T.O.M. would bill 10 miles at this Mileage Rate #2 ($1).

Total OT Wait Hours: This is Overtime Wait Hours that a driver logged for a field trip. These Overtime Wait Hours keyed directly into the Overtime Wait Time field in the Trip Employee Screen by a user .

Wait OT Hrly Rate: This is the hourly rate that is multiplied against the OT Wait Hours for the employee. This hourly rate is either found in Billing Rates screen or the Employee Screen. The Billing Rates special instructions tell T.O.M. which Wait OT Hourly Rate to use for a field trip.

Total OT Wait Amt: This is the dollar amount charged for a driver's overtime wait time for a field trip. It is calculated by multiplying the driver's overtime wait time by the overtime wait hourly rate.

Figure 5-32 provides a detailed description of each field in each line of the General Field Trip Section and Figure 5-33 provides a detailed description of each field in each line of the Detailed Employee Section.

?My Group Invoice, Estimate or Billing Prep Report takes too long to open up when I first select it from the menu. How can I speed this up?

When the Group Invoice, Estimate or Billing Prep Report Print Screen first loads it will immediately fill the lookup list of field trips with ALL of your field trips in your field trip database. After a while this can be quite a lot of field trips and eventually may slow the loading process of your field trip program and field trip inquiry program to unacceptable levels. T.O.M. has planned for this event. You may instruct T.O.M. that you do not wish to have the Field Trip Search / Select screen list all of the field trips in your field trip database when it first loads. Rather, you can tell T.O.M. to load the Group Estimate, Invoice or Billing Prep Report Print Screen without displaying ANY field trips at first. This will cause the Group Estimate, Invoice or Billing Prep Report Print Screen to load much faster. You may then enter your search parameters and then click the Find All button. Only then will T.O.M. fill the field trip list and in that list will only be field trips that meet your search parameters.

To instruct T.O.M. NOT to load the Group Estimate, Invoice or Billing Prep Report Print Screen with ALL of your field trips when it first loads you would *uncheck* the check box in your District Options that is labeled 'Auto Fill Field Trip Lists'. See *Chapter 4 – District Options* in the *T.O.M. Getting Started Manual*.

5/10/00 11:26:27 AM   PARADISE VALLEY SCHOOL DISTRICT # 69   Page: 1

Billing Preparation Report

Column headers (summary): Total Hours / Hourly Rate(#1)/ Hours — Amount | Total Miles / Mileage Rate(#1)/ — Mileage Amount | Flat Amount #1 / #2 / #3 | Flat Amount #4 / #5 / Total Emp. Exp. | Tot. OT Hours / Tot. OT. Amt. / Total Amount

---

Trip #: 9679

Customer: DESERT SHADOWS MIDDLE   Description: MARICOPA COUNTY HOSPITAL

- ☑ Billed   Date of Departure: 10/15/99   ☑ Allow to be Billed
- ☑ Assigned   Billing Instructions: Step Rates
- # of Hours @ Rate1: 1.00   Hourly Rate #2:
- # of Miles @ Rate1: 10.00   Mileage Rate #2:

Summary:
- Total Hours / Rate(#1) / Hours: 2.5   Hourly Amount: 13.00
- Total Miles / Mileage Rate(#1): 47 / 0.60   Mileage Amount: 43.00
- Flat Amount #1: 0   Flat Amount #2: 0   Flat Amount #3: 0
- Flat Amount #4: 0   Flat Amount #5: 0   Total Emp. Exp.: 0.00
- Tot. OT Hours: 0.00   Tot. OT. Amt.: 0.00   **Total Amount: $78.50**

Total Wait Hours: 15.00   Total Wait Amt: 0.00
Total OT Wait Hours: 1.00   Total OT Wait Amt: 0.00
Wait Hrly Rate: 0.00   Wait OT Hrly Rate: 0.00

SAUNDERS, SUSAN

	Hours / Miles	Bill	Rate	Hrly/Mile Amount	Emp. Expense / Min / Calc	Amt. Billed for Driver
Actual: Hours	2.50					
Actual: Miles	47.00					
Min: Hours	0.00					
Min: Miles	0.00					
Wait: Hours	0.00		Rate: 0.00			
Cust. Hours	2.50	Bill Hours: 0.00	Rate: 2.50	Hrly Amount: 13.00	Emp. Expense: 35.50	0.00
Cust. Miles	47.00	Bill Miles: 16.00	Rate: 47.00	Mile Amount: 0.60	Min Amount: 28.20	0.00
		OT Hours: 0.00	Rate: 0.00	OT Amount: 0.00	Calc. Amount: 0.00	78.50
		OT Hours: 0.00	Rate: 0.00	OT Amount: 0.00	0.00	

Trip #: 9008

Customer: NORTH CANYON HIGH SCHOOL   Description: HORIZON HIGH SCHOOL

- ☑ Billed   Date of Departure: 10/13/99   ☑ Allow to be Billed
- ☑ Assigned   Billing Instructions: Step Rates
- # of Hours @ Rate1: 1.00   Hourly Rate #2:
- # of Miles @ Rate1: 10.00   Mileage Rate #2:

Summary:
- Total Hours / Rate(#1) / Hours: 10.25   Hourly Amount: 13.00
- Total Miles / Mileage Rate(#1): 71 / 0.60   Mileage Amount: 63.00   (149.75)
- Flat Amount #1: 0   Flat Amount #2: 0   Flat Amount #3: 0
- Flat Amount #4: 0   Flat Amount #5: 0   Total Emp. Exp.: 0.00
- Tot. OT Hours: 0.00   Tot. OT. Amt.: 0.00   **Total Amount: $212.75**

Total Wait Hours: 15.00   Total Wait Amt: 0.00
Total OT Wait Hours: 1.00   Total OT Wait Amt: 0.00
Wait Hrly Rate: 0.00   Wait OT Hrly Rate: 0.00

MARTYNE, YVONE

	Hours / Miles	Bill	Rate	Hrly/Mile Amount	Emp. Expense / Min / Calc	Amt. Billed for Driver
Actual: Hours	5.25	Bill Hours: 0.00	Rate: 5.25	Hrly Amount: 13.00	Emp. Expense: 76.75	0.00
Actual: Miles	30.00	Bill Miles: 6.00	Rate: 30.00	Mile Amount: 0.60	Min Amount: 18.00	0.00
Min: Hours	0.00	OT Hours: 0.00	Rate: 0.00	OT Amount: 0.00	Calc. Amount: 0.00	102.75
Min: Miles	0.00	OT Hours: 0.00	Rate: 0.00	OT Amount: 0.00	0.00	
Wait: Hours	0.00		Rate: 0.00			

HERZOG, DONNA

	Hours / Miles	Bill	Rate	Hrly/Mile Amount	Emp. Expense / Min / Calc	Amt. Billed for Driver
Actual: Hours	5.00	Bill Hours: 0.00	Rate: 5.00	Hrly Amount: 13.00	Emp. Expense: 73.00	0.00
Actual: Miles	41.00	Bill Miles: 6.00	Rate: 41.00	Mile Amount: 0.60	Min Amount: 24.60	0.00
Min: Hours	0.00	OT Hours: 0.00	Rate: 0.00	OT Amount: 0.00	Calc. Amount: 0.00	110.00
Min: Miles	0.00	OT Hours: 0.00	Rate: 0.00	OT Amount: 0.00	0.00	
Wait: Hours	0.00		Rate: 0.00			

Annotation: The Summary Billing Information for a field trip.

Annotation: Figure 5-31. The Billing Preparation Report

Annotation: The Detailed Employee section. In this example, there are 2 employees assigned to this field trip.

The General Field Trip Section of the Billing Preparation Report

LINE 1

Trip#: This is the number of the field trip that will be billed.

Customer: This is the name of the customer assigned to the field trip.

Description: This is the description of the primary destination assigned to the field trip.

Total Hours: This is the total driver hours that will be billed for the field trip.

Total Miles: This is the total vehicle miles that will be billed for the field trip.

Flat Amount #1: This is the first of five flat amounts that you may enter for a field trip.

Flat Amount #4: This is the fourth of five flat amounts that you may enter for a field trip.

Total OT Hours: This is the total employee hours that were paid the employee's overtime hourly billing rate. This field will only be calculated if the field trip is using a Billing Rate with the Billing Instructions of 'Employee Rates with OT' or 'Employee Rates with Daily OT'.

LINE 2

Billed: This is a checkbox indicating if a field trip has been billed. If the box is CHECKED then the field trip has been billed if the box is UNCHECKED then the field trip has NOT been billed.

Date of Departure: This is the field trip's date of departure.

Allow To Be Billed: This is a checkbox indicating whether you are allowing the field trip to be automatically billed by T.O.M. If the box is CHECKED the field trip is allowed to be billed. If the box is UNCHECKED then the field trip is not allowed to be billed by T.O.M.

Hourly Rate #1: This is the billing rate that will be multiplied against the driver's actual hours. This rate is found in the Billing Rate Screen of the Billing Rate assigned to the field trip. **NOTE:** If the Billing Rate has Billing Instructions of 'Employee Rates', 'Employee Rates with OT' or 'Employee Rates with Daily OT' then this rate is only used in calculating a estimate amount for the field trip and is NOT multiplied against the driver's actual hours. The hourly billing rate entered in the employee screen is the rate that is multiplied against each driver's actual hours. If the billing rate has Billing Instructions of 'Step Rates' then this is the first of two rates allowed by the step rate. It is multiplied against the number of driver hours that are less than or equal to the step hours limit.

Mileage Rate #1: This is the billing rate that will be multiplied against the actual vehicle miles of the field trip. This rate is found in the Billing Rate Screen of the Billing Rate assigned to the field trip. If the billing rate has Billing Instructions of 'Step Rates' then this is the first of two rates allowed by the step rate. It is multiplied against the number of miles that are less than or equal to the step miles limit.

Flat Amount #2: This is the second of five flat amounts that you may enter for a field trip.

Flat Amount #5: This is the fifth of five flat amounts that you may enter for a field trip.

Total OT Amt.: This is the total dollar amount calculated when the various driver's overtime hours for the field trip were multiplied by the hourly overtime billing rate entered in the Employee Screen for each driver that performed the field trip.

LINE 3

Assigned: This is a checkbox indicating if a field trip has been assigned drivers and vehicles. If the box is CHECKED then the field trip has been assigned if the box is UNCHECKED then the field trip has NOT been assigned. If the field trip is not assigned then T.O.M. will use the estimated miles and hours and the Billing Rates Mileage Rate and Hourly Rate where appropriate to calculate the amount to bill the field trip.

Billing Instructions: These are the instructions as to which mileage and hourly rates (if any) to use when billing the field trip. Billing Instructions are found in the Billing Rates Screen.

Hours Amount: This is the total amount to be charged for all of the driver's hours for the field trip. This amount is the total of each driver's Hrly Amount explained later in this section.

Mileage Amount: This is the total amount to be charged to the customer for all of the driver's actual miles. This amount is the total of each driver's Mileage Amount explained in Figure 5-33.

Flat Amount #3: This is the third of five flat amounts that you may enter for a field trip.

Continued on next page…

The General Field Trip Section of the Billing Preparation Report
Continued

Total Emp. Exp.: This is the total of all of the driver's expenses entered for each driver assigned to the field trip in the Trip Driver Information screen.

Total Amount: This is the actual amount that the customer will be charged for the field trip.

LINE 4
# of Hours @ Rate1: If you are using a billing rate with the Billing Instructions of 'Step Rates' then this number is the number of hours that will be billed at the first of the two hourly rates for the step rate. Depending on what the hours limit is in your step billing rate this number may or may not be the same as the Total Hours field found in line 1. If your field trip is using a billing rate that has a Billing Instructions NOT set to 'Step Rates' then this number will simple be the same as the Total Hours.

Hourly Rate #2: If you are using a billing rate with the Billing Instructions of 'Step Rates' then this number is the second of two hourly rates that you may enter for the step rate. T.O.M. will calculate how many hours exceeded the *step hours limit* and multiply those hours by this second hourly rate. For example you may have a step billing rate that tells T.O.M. to bill the first 2 hours at $12/ hour and then all hours after that at $15. So if a driver logged 4 hours for a trip using this rate T.O.M. would bill 2 hours at this Hourly Rate #2 ($15).

Total Wait Hours: This is Wait Hours that was either calculated by T.O.M. using the times entered for a particular employee or the hours that a user keyed directly into the Wait Time field in the Trip Employee Screen.

Wait Hrly Rate: This is the hourly rate that is multiplied against the wait hours for the employee. This hourly rate is either found in Billing Rates screen or the Employee Screen. The Billing Rates special instructions tell T.O.M. which Wait Hourly Rate to use for a field trip.

Total Wait Amt: This is the dollar amount charged for a driver's wait time for a field trip. It is calculated by multiplying the driver's wait time by the wait hourly rate.

LINE 5

# of Miles @ Rate1: If you are using a billing rate with the Billing Instructions of 'Step Rates' then this number is the number of miles that will be billed at the first of the two mileage rates for the step rate. Depending on what the miles limit is in your step billing rate this number may or may not be the same as the Total Miles field found in line 1. If your field trip is using a billing rate that has a Billing Instructions NOT set to 'Step Rates' then this number will simple be the same as the Total Miles.

Mileage Rate #2: If you are using a billing rate with the Billing Instructions of 'Step Rates' then this number is the second of two mileage rates that you may enter for the step rate. T.O.M. will calculate how many miles exceeded the *step miles limit* and multiply those miles by this second hourly rate. For example you may have a step billing rate that tells T.O.M. to bill the first 30 miles at $.05/ hour and then all miles after that at $1. So if a driver logged 40 miles for a trip using this rate T.O.M. would bill 10 miles at this Mileage Rate #2 ($1).

Total OT Wait Hours: This is Overtime Wait Hours that a driver logged for a field trip. These Overtime Wait Hours keyed directly into the Overtime Wait Time field in the Trip Employee Screen by a user .

Wait OT Hrly Rate: This is the hourly rate that is multiplied against the OT Wait Hours for the employee. This hourly rate is either found in Billing Rates screen or the Employee Screen. The Billing Rates special instructions tell T.O.M. which Wait OT Hourly Rate to use for a field trip.

Total OT Wait Amt: This is the dollar amount charged for a driver's overtime wait time for a field trip. It is calculated by multiplying the driver's overtime wait time by the overtime wait hourly rate.

Figure 5-32. The General Field Trip Section of the Billing Preparation Report

The Detailed Employee Section of the Billing Preparation Report

LINE 1

Employee Name: This is the name of each driver that was assigned to the field trip.

Cust. Hours: This the number of hours you entered in the Customer Screen for the customer assigned to the field trip. These hours were added to the employees calculated actual hours *if you told T.O.M. to calculate the employee hours*. If you did NOT tell T.O.M. to calculate the employee hours then these hours are NOT added to the calculated Actual Driver Hours.

Bill Hours: This is the number of hours that T.O.M. will bill the field trip for that particular employee. These hours will be same as either the employee's actual hours or the minimum hours entered in the Billing Rate Screen, whichever is greater.

Rate: This is the billing rate that is multiplied against the Bill Hours. This rate will either be hourly rate in the Billing Rate record if the Billing Instructions were 'Rate' or the hourly billing rate in the Employee record if the Billing Instructions were 'Employee Rates', 'Employee Rates with OT' or 'Employee Rates with Daily OT'.

Hrly Amount: This is the amount calculated when the Bill Hours were multiplied against the bill hourly rate.

Emp. Expense: This is the expense amount that you entered for the employee in the Trip Driver Information screen.

LINE 2

Actual Hours: This is the actual driver hours for this employee for this field trip entered in the Trip Driver Information screen.

Actual Miles: This is the actual driver miles for this employee for this field trip entered in the Trip Driver Information screen.

Miles: This the number of miles you entered in the Customer Screen for the customer assigned to the field trip. These miles were added to the employees calculated actual miles *if you told T.O.M. to calculate the employee miles from the odometer readings*. If you did NOT tell T.O.M. to calculate the employee miles from the odometer readings then these miles are NOT added to the calculated Actual Driver Miles.

Bill Miles: This is the number of miles that T.O.M. will bill the field trip for that particular employee. These miles will be the same as either the employee's actual miles or the minimum miles entered in the Billing Rate Screen, which ever is greater.

Rate: This is the billing rate that is multiplied against the Bill Miles. This rate is the Mileage Rate entered in the Billing Rate Screen.

Mile Amount: This is the amount calculated when the Bill Miles were multiplied against the bill mileage rate.

Min Amount: This is the minimum amount to bill for each driver assigned to the field trip. This amount is entered in the Billing Rate Screen. If the actual calculated billing amount for the driver is less than the Minimum Amount then T.O.M. will bill the customer the Minimum Amount for the driver.

LINE 3

Min: Hours: This the minimum number of hours to bill each driver assigned to the field trip. These hours are entered in the Billing Rate Screen. When determining the number of hours to bill the customer for this driver T.O.M. will compare the driver's actual hours against the Minimum Hours and choose the greater number.

Miles: This the minimum number of miles to bill each driver assigned to the field trip. These miles are entered in the Billing Rate Screen. When determining the number of miles to bill the customer for this driver T.O.M. will compare the driver's actual miles against the Minimum Miles and choose the greater number.

Amount: This is the customer amount that is entered in the Customer Screen for the customer assigned to the field trip. This amount is added to the total calculated amount to bill the customer for EACH driver assigned to the field trip.

(continued on next page)

Figure 5-33. The Detailed Employee Section of the Billing Preparation Report

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The Detailed Employee Section of the Billing Preparation Report

(continued from previous page)

LINE 3 (continued)

OT Hours: This is the number of actual driver hours for the field trip that were found to be in overtime. For more detailed information about how T.O.M. calculates the number of driver hours that are considered in overtime see the section titled 'How T.O.M. Calculates the Amount to Bill a Field Trip' found earlier in this chapter. **NOTE:** T.O.M. will only calculate these hours if the Billing Instructions for the Billing Rate assigned to the trip are 'Employee Rates with OT' or 'Employee Rates with Daily OT'.

Rate: This is the Overtime Hourly Billing Rate that is multiplied against the Overtime Hours. The Overtime Hourly Billing Rate is found in the Employee Screen for each employee assigned to the field trip.

OT Amount: This is the dollar amount calculated when multiplying a driver's Overtime Hours against the Driver's Overtime Hourly Billing Rate.

Calc. Amount: This is the amount to bill a customer for an individual driver BEFORE it is compared to the Minimum Amount. This amount is the total of the Hourly Amount, Mileage Amount, OT Amount and Customer amount.

Amt. Billed for Driver: This is the actual amount that the customer will be billed for an individual driver. It is equal to either the Calc. Amount or the Minimum Amount whichever is greater.

LINE 4

Wait Hours: This is the number of wait time hours that was entered for the driver or calculated by T.O.M for the driver based on the drivers times.

Wait Rate: This is the Wait Hourly Billing Rate that is multiplied against the Wait Hours. The wait Hourly Billing Rate is found in either the Billing Rate Screen or the Employee Screen for each employee assigned to the field trip.

Amount: This is the dollar amount calculated when multiplying a driver's Wait Hours against the driver's Wait Rate.

OT Hours: This is the number of wait time hours that were considered in overtime. These hours are entered in the Trip Driver Information Screen.

Rate: This is the Overtime Wait Hourly Billing Rate that is multiplied against the Overtime Wait Hours. The wait Overtime Hourly Billing Rate is found in either the Billing Rate Screen or the Employee Screen for each employee assigned to the field trip

OT Amount: This is the dollar amount calculated when multiplying a driver's Overtime Wait Hours against the Driver's Overtime Wait Hourly Billing Rate.

Figure 5-35 (continued). The Detailed Employee Section of the Billing Preparation Report

Searching and Sorting Field Trips

The searching and sorting features of the Group Estimate, Invoice or Billing Preparation Report Print screen (Figure 5-22) is very powerful, but very easy to use. To search your field trips just enter your search parameters and click the Find All button. In a few moments T.O.M. will display in the selected records box all the Field Trip records that matched your search parameters. The records will be sorted according to the sorting and lookup options you choose. Let's take a closer look at how use the searching feature of this screen. Figure 5-22 shows the key search portions of the Mass Billing screen.

The screen uses a 'Tabbed' format. That is, the information on this portion of the screen is grouped into different sections that you can display by clicking on that group's tab. Below is a discussion of each field in each group of the search and sort portion of the screen.

Entering Search Criteria on the Dates and General Tab

This section describes the search fields in the Dates and General tab on the Mass Billing screen (Figure 5-34).

Figure 5-34. The General Tab on the Group Estimate, Invoice and Billing Prep Report Screen

Departure Date Range: You can use the preprogrammed date ranges found in the Dates field drop-down list or enter your own date ranges. If you use the preprogrammed date ranges, click on the Dates field drop-down arrow and select from one of 12 date ranges, such as 'Today', 'This Week', 'Last Year' etc. The date ranges are automatically filled in for you.

If you enter your own date ranges, use these fields to search your field trips by their departure date. T.O.M. makes it easy for you to key in any date. Rather than having to type in a "/" or a"-" when typing in the date, T.O.M. automatically places a "/" between the Month, Day and Year (this is called 'masking').

You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of "3/2/1994" you would enter "03021994" and T.O.M. would automatically place two "/" in the appropriate positions in the date. The year must be entered as the full year (ex. "2000" not "00"). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen click on the little button next to this date field that looks like a small calendar. See *Appendix C - The Pop Up Calendar and Time Entry Screens* in the *T.O.M. Getting Started Manual* for more details.

NOTE: You can combine search parameters for more exact searches. For example, you could enter a departure date range and a destination to get only unbilled field trips made for that destination for that date range. The following is a description of each of the search parameters that T.O.M. allows you to use when searching for unbilled field trips.

Customer: You may select a specific customer to search your field trips by. For example, you would use this to search for all field trips for a particular school. If you know the number of the customer then enter it here. Don't worry if you don't know the customer number. T.O.M. gives you an easy way to look up your customer by the customer name. To do this you click the Customer button. This causes the Custom Search Screen to appear. This screen will allow you to quickly search your existing customers by an alphabetic lookup. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Guide* for details about searching for customers.

Destination: You may select a specific destination to search your Field Trips by. For example, you may search all field trips requests for the city zoo. If you know the number of the destination of the field trip then enter it here. If you don't know the destination number, T.O.M. will provide an easy way to look up your destination by the destination name (or description). To do this you click the Destination button. This causes the Destination Search Screen to appear. This screen will allow you to quickly search your existing destination by an alphabetic lookup. See *Chapter 8 – Destinations* in the *T.O.M. Getting Started Guide* for details about searching for destinations.

Selected Trip #: As with the field trip requests, T.O.M. automatically numbers each field trip with a unique number when it is added to the field trip database. You can then search the field trip database for a specific field trip number.

Trip # Range: Search for a range of trip numbers. Enter the beginning trip number in the first field. Enter the ending trip number in the second field.

Entering Search Criteria on the Assignment Tab

This section describes the search fields in the Assignment tab on the Detailed Field screen (Figure 5-35).

Figure 5-35. The Assignment Tab on the Group Estimate, Invoice and Billing Prep Report Screen

Selected Schedule: A schedule is a list of drivers that you create when you first set up T.O.M. When a field trip is added to the field trip database you assign a schedule to that field trip. You may then search the field trip database for all field trips with a specific schedule. Click on the down arrow to the right of the Schedule field to see a list of schedules that your transportation department has created. Once you find the schedule you desire click on it and it will automatically appear in the Schedule field. **NOTE:** T.O.M. will only search the field trips on their FIRST schedule. It will not search their other four schedules to see if they match the selected schedule entered here.

Assigned: This field is a check box field. That means it can either be checked or unchecked. If the field is checked you are telling T.O.M. to search for all assigned field trips. An assigned field trip is a field trip that has drivers and vehicles assigned to perform the field trip.

Unassigned: This field is a check box field. That means it can either be checked or unchecked. If the field is checked you are telling T.O.M. to search for all field trips that have NOT been assigned. An assigned field trip is a field trip that has drivers and vehicles assigned to perform the field trip.

Billed: This field is a check box field. That means it can either be checked or unchecked. If the field is checked you are telling T.O.M. to search for all field trips that have been billed.

Unbilled: This field is a check box field. That means it can either be checked or unchecked. If the field is checked you are telling T.O.M. to search for all field trips that have NOT been billed.

Entering Search Criteria on the Billing Tab

This section describes the search fields in the Billing tab on the Detailed Field screen
(Figure 5-36).
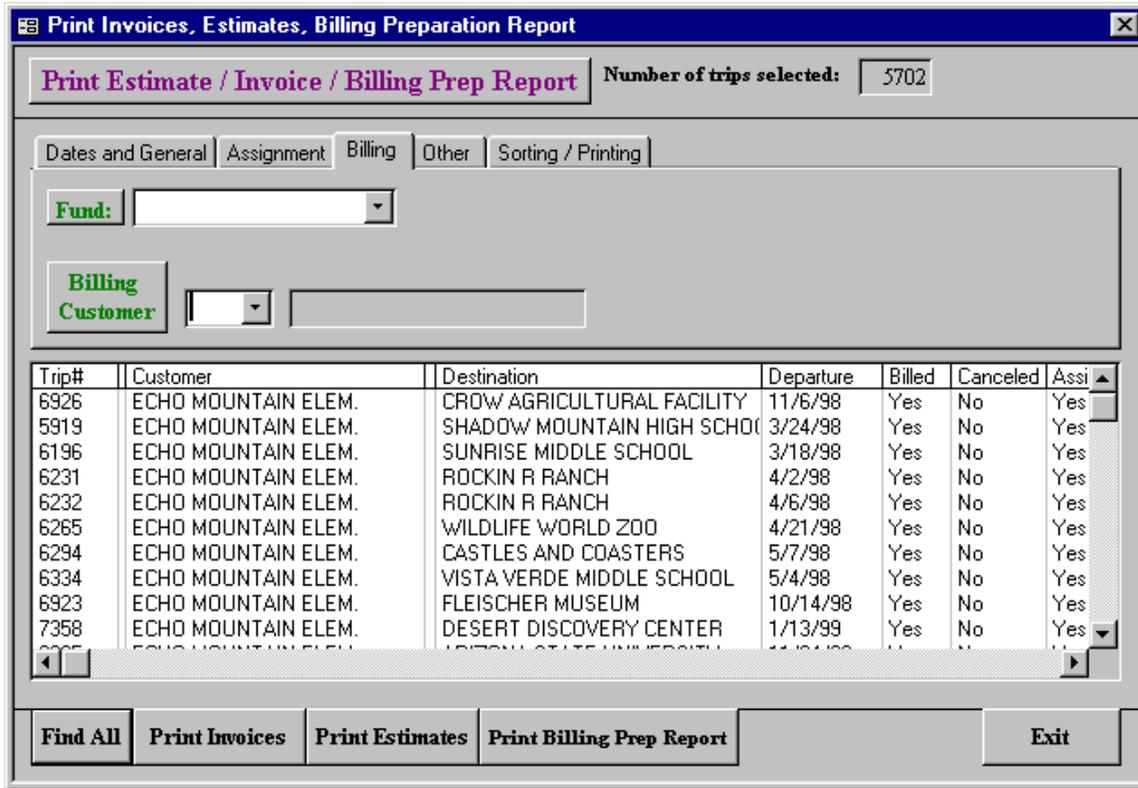
Figure 5-36. The Billing Section on the Group Estimate, Invoice and Billing Prep Report Screen

Fund: You may select a specific fund that the field trip is charged against. This field is a drop down list
box. If you don't know the number of the fund that you want to charge a field trip against click the down
arrow next to the fund box. A list of all the funds you entered when setting up T.O.M. will appear. Simply
locate the desired fund, point to it with your mouse and click. T.O.M. will automatically place the selected
fund into the fund box.

If you know the number of the fund that is requesting the field trip then enter it here. Don't worry if you
don't know the fund number. T.O.M. gives you an easy way to lookup your fund by the fund name. To do
this you click the Fund button. This causes the Fund Search Screen to appear. This screen will allow you
to quickly search your existing funds by an alphabetical lookup. See *Chapter 3 – Entering Lookup Lists* in
the *T.O.M. Getting Started Guide* for details about searching for funds.

Billing Customer: This allows you to search by the customer who received the bill if it was different than
the customer who took the field trip. If you know the number of the customer then enter it here. Don't
worry if you don't know the customer number. T.O.M. gives you an easy way to lookup your customer by
the customer name. To do this you click the Billing Customer button. This causes the Customer Search
Screen to appear. This screen will allow you to quickly search for the billing customer by an alphabetical
lookup. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Guide* for details about searching for
customers.

Entering Search Criteria on the Other Tab

This section describes the search fields in the Other tab on the Detailed Field screen
(Figure 5-37).

Figure 5-37. The Other Section on the Group Estimate, Invoice and Billing Prep Report Screen

Selected Request #: If the field trip was created when a field trip request was accepted by the transportation department the field trip is *stamped* with the number of the field trip request that it was created from. You then search the field trips in the field trip database by the your original field trip request number. For example, you can search the field trip database for the field trip that was created from your field trip request #100.

Selected Grade: You may search your field trips by the student grade level that you assigned to the trips. Click on the down arrow to the right of the grade field to see a list of grades that you may select. Once you find the grade you desire click on it and it will automatically appear in the grade field.

Selected Internal Number: Some school districts have preprinted, pre-numbered field trip request forms and they track the field trip by that preprinted number. T.O.M. stores this information in the Internal Field Trip number. You may search your field trips by this number.

Selected Category: A field trip may be assigned a category code defined by you. These codes can be used to group similar field trips (for example, boys basketball). You may then search the field trip database for field trips with a specific category. Click on the down arrow to the right of the Category field to see a list of Categories that you created when you first setup T.O.M. Once you find the Category you desire click on it and it will automatically appear in the Category field

Select Division: Customers can be assigned to divisions. You may then search field trips by division. If you know the division that you wish to search by then enter here. If you don't know the division you desire T.O.M. provides you with an easy *drop down list* of all of the divisions that you have created. Just click the down arrow to the right of the Division field and a list of existing divisions will display on your screen. To select a division click on the row containing the desired division and that division will automatically appear in the Select Division field.

Entering Sort Criteria on the Sorting and Printing Tab

This section describes the sort and ordering fields you can use in the Sorting and Lookup tab on the Detailed Field screen (Figure 5-38).
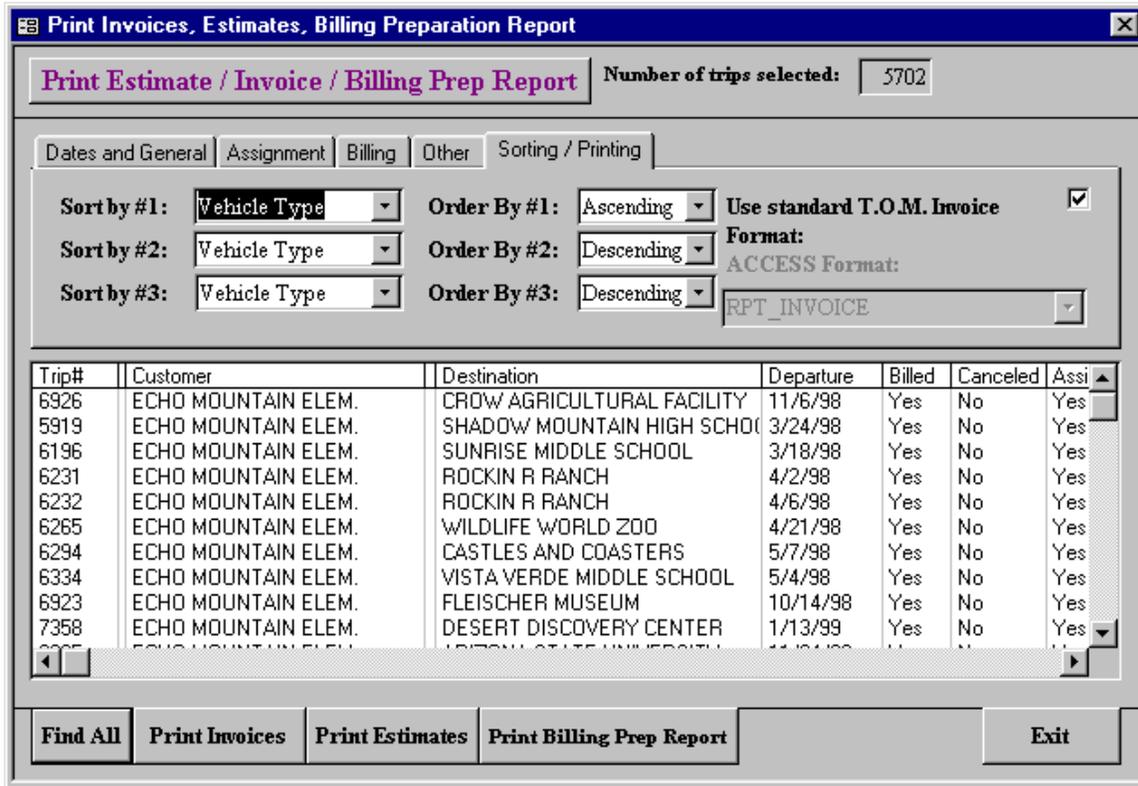
Figure 5-38. The Sorting / Printing Section on the Group Estimate, Invoice and Billing Prep Report Screen

Sort by #1: This is the primary sort field. T.O.M. will use this field to sort first. Click on the drop down arrow to select the field by which to sort. You can sort this field in Ascending or Descending order, which is specified in the Order By # 1 field.

Sort by #2: This is the secondary sort field. T.O.M. will use this field to sort second within the results of the Sort by #1 field. Click on the drop down arrow to select the field by which to sort. You can sort this field in Ascending or Descending order, which is specified in the Order By # 2 field.

Sort by #3: This is the third sort field. T.O.M. will use this field to sort third within the results of the Sort by #2 field. Click on the drop down arrow to select the field by which to sort. You can sort this field in Ascending or Descending order, which is specified in the Order By # 3 field.

Order by #1: Sorts the results of the Sort by #1 field in either Ascending or Descending order. Click the drop down arrow to choose the sort order.

Order by #2: Sorts the results of the Sort by #2 field in either Ascending or Descending order. Click the drop down arrow to choose the sort order.

Order by #3: Sorts the results of the Sort by #3 field in either Ascending or Descending order. Click the drop down arrow to choose the sort order.

Use Standard T.O.M. Invoice Format: T.O.M. allows you to use Microsoft Access 97 to customize many of T.O.M.'s reports. One of these reports is the Field Trip Invoice. This is a check box that you may either check or uncheck. If you check this field you are telling T.O.M. to automatically use the regular invoice format. If you uncheck this field you can use a custom invoice format that you have stored in the MS Access database TRIPRPT.MDB. This report is selected using the ACCESS format drop-down list as described below. See *Appendix D – Using MS Access to Customize T.O.M. Reports* in this manual for details about customizing your own reports.

ACCESS Format: If you uncheck the Use Standard T.O.M. Invoice Format checkbox as described above, you can click the drop-down arrow and select from any of the available formats. See *Appendix D – Using MS Access to Customize T.O.M. Reports* in this manual for details about customizing your own reports.