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).

| 🔠 T.O.M Transp | portation Operations M | anager | | | |
|---|---|--------------------------|--|------------------------------------|---|
| | Field Trip | Field Trip R | equest #: | Assig | gned |
| General | Instructions | Assignment | Billing | s Oth | er |
| Field Trip #: Request Date: Customer: | 5775 2/5/1998 🖬 Dro 83 QUAIL RUN | p / Return: 🗖 🛛 ELEM. | Departure: Return : | Date 3/18/1998 3/18/1998 | Time 9:15 AM 1:30 PM |
| Contact: Destination: | HELEY 3RD 80 ARIZONA SC 600 E. WASHINGTON | CIENCE CEN' | Est. Driver Time : # of Students : Schedule: | 4.75 M 130 Add | Est. iiles: 45.00 # of ults : 26 |
| Out of Town: | Fund: | 9 ± | Purpose : | | |
| OK Save | Addit. Trip Dates Auto Assign Driver | Trip Driver Info | nt ip ket Est. | Bills and Pymts Bill Trip | Cancel Trip Exit |
| Click the Trip Dr enter driver miles | iver Info button to s 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.

| Trip Driver | Information Driver | Informat | tion | 5775 | QUAIL R ARIZON | UN ELEM. A SCIENCE CENTER |
|--------------------------|-----------------------|----------------------------|------------------------------------|------------|-------------------|------------------------------|
| General Note | es Other | | Vehicle # | Miles | Hours | Status |
| 61 | SHARON | BASBANU | 32 • | 0.0 | 0.00 | Assigned - |
| | <u>Odometer</u> | <u>Time</u> | | OT Hours: | 0.00 | Calculate OT: 🔽 |
| Start: | | | v | Vait Time: | 0.00 | |
| Arrival: | | 0 | от у | Vait Time: | 0.00 | |
| Leave: | | | Н | ours Paid: | 0.00 | |
| End: Calc Wait T | Calc Miles | Calc Hours | Customer Miles: Customer Hours: | 0.00 | Expen | se: \$0.00 |
| Add Di Manu | river ally | Add Driver Automaticall | у . | Log | | Exit |
| Record: 🚺 🔳 | 1 | ▶ ▶ ▶ ▶ ★ of 3 (I | Filtered) | | | |
| · Click on a ta options. | b to view its |] | | | | |

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).

| Trip Driver Information | | | | | × |
|--|-----------------------------|------------------------------------|-----------|---------------------------|--|
| Trip Driver | Informati | on | 5775 | QUAIL R ARIZON | UN ELEM. A SCIENCE CENTER |
| General Notes Other | | | | | |
| Employee | | Vehicle # | Miles | Hours | Status |
| 61 SHARON | BASBANU | 32 🔹 | 45.0 | 4.50 | Assigned 🔹 |
| <u>Odometer</u> | Time | 07 | [Hours: | 0.00 | Calculate OT: 🔽 |
| Start: | | Wa | ut Time: | 0.00 | |
| Arrival: | | OT Wa | ut Time: | 0.00 | |
| Leave: | | Hou | ırs Paid: | 4.50 | |
| End: Calc Miles | Calc Hours C | 'ustomer Miles: 'ustomer Hours: | 0.00 | Expens | se: \$0.00 |
| Add Driver Manually Record: 11 1 | Add Driver Automatically | ered) | Log | | Exit |
| | | | | Driver where trip m | r miles and hours fields each driver's actual field iles 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 Odomete and Time entries. |
|---|--|
| 🗃 Trip Driver Information | × |
| Trip Driver Information 5775 | QUAIL RUN ELEM. ARIZONA SCIENCE CENTER |
| General Notes Other | |
| Employee Vehicle # Miles | Hours Status |
| 61 SHARON BASBANU 32 - 35.0 | 4.65 Assigned |
| Odometer <u>Time</u> OT Hours: | 0.00 Calculate OT: 🔽 |
| Start: 45120 8:00 AM 🕑 Wait Time: | 0.00 |
| Arrival: OT Wait Time: | 0.00 |
| Leave: O Hours Paid: | 0.00 |
| End: 45155 12:39 PM 🕥 | |
| Calc Miles Calc Hours Customer Hours: 0.00 Calc Wait Time: 0.00 | Expense: \$0.00 |
| | |
| Add Driver Manually Add Driver Automatically Log | Exit |
| | |

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 these two segments and places them in the Miles and Hours fields in the Trip Driver Information screen (Figure 5-5).

|] 1 | rip Driver | Information | | | | | the driver's miles and ho the Odometer and Time |
|-----|-------------------------|-----------------|-----------------------------|------------------------------------|------------|---------------------|--|
| T | rip I |)river] | Informat | ion | 5775 | QUAIL RI ARIZONA | IN ELEM. A SCIENCE CENTER |
| Gε | eneral Note Employee | es Other | | Vehicle # | Miles | Hours | Status |
| | 61 | SHARON | BASBANU | 32 • | 51.0 | 2.40 | Assigned 💽 |
| Γ | | <u>Odometer</u> | <u>Time</u> | (|)T Hours: | 0.00 | Calculate OT: 🔽 |
| I | Start: | 45120 | 8:00 AM 🕚 | v | Vait Time: | 0.00 | |
| | Arrival: | 45137 | 9:15 AM 🕒 | от у | Vait Time: | 0.00 | |
| | Leave: | 45144 | 11:30 AM 🕓 | Н | ours Paid: | 0.00 | |
| | End: | 45178 | 12:39 PM 🕒 | | | | |
| (| Calc Wait I | Calc Miles | Calc Hours | Customer Miles: Customer Hours: | 0.00 | Expense | e: \$0.00 |
| | Add Di Manu | river ally | Add Driver Automatically | | Log | | Exit |
| - | | | • • | · · · · | | | |

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.

| rip I |)river] | Informati | on | | 5775 | QUAIL R ARIZON | UN ELEM. A SCIENCE CENTER |
|----------------|-----------------|-----------------------------|------------|--------|-----------|-------------------|------------------------------|
| ral Note | s Other | | | | | | |
| Employee | | | Vehicle | e # | Miles | Hours | Status |
| 61 | SHARON | BASBANU | 32 | • | 40.0 | 4.90 | Assigned - |
| | <u>Odometer</u> | <u>Time</u> | | 0 | ſ Hours: | 0.00 | Calculate OT: 🔽 |
| Start: | 45120 | 8:00 AM 🕚 | | Wa | ait Time: | 0.00 | |
| Arrival: | | | | OT Wa | ait Time: | 0.00 | |
| Leave: | | 8 | | Hou | ırs Paid: | 0.00 | |
| End: | 45153 | 12:39 PM 🕲 | | | | | |
| | Calc Miles | Calc Hours | 'ustomer M | liles: | 7.00 | ▲ | |
| alc Wait T | ïme: 🗆 | C | ustomer H | ours: | 0.25 | Ехрен | se: \$0.00 |
| | | | | | | | |
| Add Di Manu | river ally | Add Driver Automatically | T | | Log | | Exit |
| rd: 🖬 🔍 | 1 | ▶ ▶ ▶ ▶ ■ ▶ ■ of 3 (Fil | tered) | | | | |

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).



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.

| 🗃 Trip Driver Ir | nformation | | | | | × |
|------------------|-------------------|---------------------------|-----------------|-----------|--------------------|------------------------------|
| Trip D | river I | nforma | tion | 5775 | QUAIL R ARIZON, | UN ELEM. A SCIENCE CENTER |
| General Notes | Other | | | | | |
| Employee | | | Vehicle # | Miles | Hours | Status |
| 61 5 | SHARON | BASBANU | 32 🔹 | 40.0 | 4.90 | Assigned 🔹 |
| | <u>Odometer</u> | <u>Time</u> | ОТ | Hours: | 0.00 | Calculate OT: 🔽 |
| Start: | 45120 | 8:00 AM 🕚 | Wai | t Time: | 0.00 | |
| Arrival: | | 0 | OT Wai | it Time: | 0.00 | |
| Leave: | | <u> </u> | How | rs Paid: | 0.00 | |
| End: | 45153 | 12:39 PM 🕒 | Customer Miles: | 7.00 | | |
| Calc Wait Ti | Calc Miles me: | Calc Hours | Customer Hours: | 0.25 | Expens | se: \$75.00 🗲 |
| | | | | | | |
| Add Dri Manua | ver illy | Add Driver Automatical | ly I | og | | Exit |
| Record: 🚺 🔳 | 1 | ▶ ▶ ▶ ▶ ★ of 3 (| (Filtered) | | | |
| | | | Enter | the dolla | ar amount | t of a specific driver's |

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.

| | 🗃 Trip Driver Information | × |
|-------------------------|--|--|
| Click on the Other tab. | Trip Driver Information | 5775 QUAIL RUN ELEM. ARIZONA SCIENCE CENTER |
| | General Notes Other Add to Emp.'s OT Hours: Post Date: 4/9/1998 | |
| | Add Driver Manually Add Driver Automatically Record: I I I | Log Exit |

Figure 5-9. The Post Date (or Date the Employee's Actual Time Was Entered into T.O.M.)

The Post Date automatically defaults to the date of the day that you enter the driver's actual hours. But it can be changed.



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.

| 8 Trip Driver Information | | | | × |
|---------------------------|-----------------------------|----------------|---------------------|------------------------------|
| Trip Driver In | formation | 5775 | QUAIL RU ARIZONA | IN ELEM. . SCIENCE CENTER |
| General Notes Other | | | | |
| Employee | Vehicle # | Miles | Hours | Status |
| 61 SHARON E | ASBANU 32 | • 40.0 | 4.50 | Assigned 💽 |
| <u>Odometer</u> | Time | OT Hours: | 0.00 | Calculate OT: 🔽 |
| Start: | 0 | Wait Time: | 0.00 | |
| Arrival: | 0 | l Wait Time: | 0.00 | |
| Leave: | 0 | Hours Paid: | 4.50 | t |
| End: | | 7.00 | | |
| Calc Miles Ca | le Hours | s: 7.00 | E | er (* 25.00 |
| Calc Wait Time: | Customer nou | rs: 0.25 | Lapens | e: |
| | | | | |
| Add Driver Manually | Add Driver Automatically | Log | | Exit |
| | ► ► of 3 (Filtered) | | | |
| | | | | |
| | The | Hours Paid f | ield defau | Its to the hours |
| | bill | ed, but it can | be change | d. This amount will |
| | sno | w up in me E | mpioyee P | ayron kepons. – |

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.

| 🗃 Trip Driver Information | × |
|--|-----------------------------------|
| Trip Driver Information 5775 QUAIL ARIZO ARIZO <th>. RUN ELEM. DNA SCIENCE CENTER</th> | . RUN ELEM. DNA SCIENCE CENTER |
| General Notes Other | |
| Add to Emp.'s OT Hours: Post Date: 4/9/1998 | |
| Add Driver Manually Add Driver Automatically Log Record: I I I | Exit |
| Figure 5-11. The Add to Emp.'s OT Hours Checkbox | ς |

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*.

| Trip Driver Information | | | | | | × |
|-------------------------------------|-----------------------------|------------------------------------|----------|-------------------|---------------------------|------------|
| Trip Driver | Informat | ion | 5775 | QUAIL R ARIZON | UN ELEM. A SCIENCE CEN | ITER |
| General Notes Other | | | | | | |
| Employee | | Vehicle # | Miles | Hours | Status | |
| 61 SHARON | BASBANU | 32 - | 40.0 | 4.50 | Assigned | • |
| <u>Odometer</u> | <u>Time</u> | от | Hours: | 0.00 | Calculate OT | : |
| Start: | 0 | Wa | it Time: | 0.00 | | |
| Arrival: | | OT Wa | it Time: | 0.00 | | |
| Leave: | 0 | Hou | rs Paid: | 4.50 | | |
| End: Calc Miles | Calc Hours | Customer Miles: Customer Hours: | 7.00 | Expens | se: \$7. | 5.00 |
| Add Driver Manually Record: 1 | Add Driver Automatically | ltered) | Log | | E | <u>xit</u> |

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.



| 📰 Trip Driver Information | | | | | | X |
|-----------------------------------|-----------------------------|------------------------------------|-----------|-------------------|------------------------------|-----|
| Trip Driver | Informat | ion | 5775 | QUAIL R ARIZON | UN ELEM. A SCIENCE CENTEI | ર |
| General Notes Other | | | | | | |
| Employee | | Vehicle # | Miles | Hours | Status | |
| 61 SHARON | BASBANU | 32 • | 40.0 | 4.50 | Assigned - |] |
| <u>Odometer</u> | Time | 0 | T Hours: | 2.00 | Calculate OT: | ╶╺┼ |
| Start: | 9 | w | ait Time: | 0.00 | | |
| Arrival: | | OT W | ait Time: | 0.00 | | |
| Leave: | | Ho | urs Paid: | 4.50 | | |
| End:Calc Wait Time: | Calc Hours | Customer Miles: Customer Hours: | 7.00 | Expen | se: \$75.00 | _ |
| Add Driver Manually Record: | Add Driver Automatically | ltered) | Log | | Exit | |

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.



| Trip Driver Information | | × |
|---|---|---|
| Trip Driver Inform | nation 5775 | QUAIL RUN ELEM. ARIZONA SCIENCE CENTER |
| General Notes Other | | |
| Driver was very cooperative and performed | her duties efficiently and in a timely manr | |
| Add Driver Manually Record: 1 | iver tically of 3 (Filtered) | Exit |
| | Enter driver notes. This field ca independently authorized in the portion of T.O.M. | n be security |

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:



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 A Hours x Employee's Hourly Rate) + Driver's Employee Expense for 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: INDIS Field Trip Customer: Echo Mc Flat Amount #1: \$50 #2: \$20 | T Number of Dri ountain #3: \$0 #4: \$0 #5: \$0 | ivers: 2 | |
|--|---|---|---|--|
| Driver 1: Kathy Unger Driver 2: Sandy Werser | Actual Miles: 35 Actual Miles: 36 | Actual Hours: 2 Actual Hours: 1.75 | Driver Expense: 0 Driver Expense: 35 | |
| Example Billing Rate:Example Customer:Billing Rate: INDISTCustomer Name: Echo MountainBilling Instructions: RATECustomer Amount: 0Mileage Rate: \$.60Customer Amount: 0Hourly Rate: \$15.00Minimum Miles: 0Minimum Hours: 2Minimum Amount: 0 | | | | |
| Field Trip Calculation: Each Driver's Cost = | : (Driver's Actual Miles x Billir | ng Rate's Mileage Rate) | + (Driver's Actual Hours | |
| | Billing Rate's Hourly Rate) + Amount (entered in the Custor | Driver's Employee Expo ner Screen). | ense for the Trip + Customer | |
| Kathy Unger's Total Ch Sandy Werser's Total C | arge = $(35 \times .6) + (2 * 15) + 0$ harge = $(36 \times .6) + (2 * 15) + 3$ | 0 = \$51 5 + 0 = \$86.6 | | |
| (Notice that the Minimu | m Hours of 2 was used for Sana | ly instead of her actual l | hours of 1.75.) | |

| Trip Amount Trip Amount | = | Total Driver Amount + Total of 5 Flat Miles \$137.60 + \$50 + \$20 + \$0 + \$0 + \$0 = \$207.60 |
|--|---|---|
| Total Driver Amount Total Driver Amount | = | Total of (Each Driver's Cost) for All Drivers that Performed the Field Trip \$51 + \$86.6 = \$137.6 |



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 Field Trip Custor | g Rate: INDIST ner: Echo Mountain | Numl | per of Drivers: 2 | |
|---------------------------|---|--------------------------------------|---------|--------------------|-----------------|
| | Flat Amount #1: | \$50 #2: \$20 #3: \$0 | #4: \$0 | #5: \$0 | |
| Driver 1: Kathy Unger | Actual Miles: 3 | 35 Actual Hours | : 2 | Driver Expense: 0 | Rate #1: \$13 |
| Driver 2: Sandy Werser | Actual Miles: 3 | 36 Actual Hours | : 1.75 | Driver Expense: 35 | Rate #1: \$14.5 |
| Example Billing Rate: | | Example Custome | r: | | |
| Billing Rate: INDIST | | Customer Name: Ed | cho Mou | ntain | |
| Billing Instructions: Emp | ployee Rate | Customer Amount: | 0 | | |
| Wi | th OT | | | | |
| Mileage Rate: \$.60 | | | | | |
| Hourly Rate: \$15.00 | # of Employee Ra | ate 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 \times .6) + (2 \times 13) + 0 + 0 = \47 Sandy Werser's Total Charge = $(36 \times .6) + (2 \times 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.)

| Trip Amount | = | 132.60 + 50 + 20 + 0 + 0 + 0 = 202.60 |
|---------------------|---|---|
| Total Driver Amount | = | 47 + 85.6 = 132.6 |
| 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 |



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 |

(continued on next page)



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

| Example Billing Rate | : | Example Customer: |
|--|---|---|
| Billing Rate: INDIST Billing Instructions: Er W | nployee Rates /ith Daily OT | Customer Name: Echo Mountain Customer Amount: 0 |
| Mileage Rate: \$.60 Hourly Rate: \$15.00 Minimum Miles: 0 Minimum Hours: 2 Minimum Amount: 0 | # of Employ | yee Rate to use: 1 |
| Example Employees: | | |
| Driver Name: Kathy U | Inger Drive Drive Avera Field Week | r Hourly Billing Rate #1: \$13.00 r Hourly Overtime Billing Rate #1: \$20 age non field trip hours: 35 Trip Hours Before Field Trip being Billed: 5 ly Overtime Hours Limit: 40 |
| Driver Name: Sandy W | verser Drive Drive Avera Field Week | r Hourly Billing Rate #1: \$14.50 r Hourly Overtime Billing Rate #1: \$22 age non field trip hours: 30 Trip Hours Before Field Trip being Billed: 5 ly Overtime Hours Limit: 40 |
| Field Trip Calculation | n: | |
| Driver's Trip Overtime | e Hours = ((Total Average Field Trips that (Driver's Actua Limit (Set in Er | e Weekly Hours entered in Employee Hours Screen) + (Hours of all the Driver is Assigned to Taken BEFORE This Field Trip) + l Hours of Field Trip Being Billed)) - Weekly Overtime Hours nployee Type Screen or District Options Screen) |
| Kathy Unger's Overtin Sandy Werser's Overti | me Hours = $(35 + 3)$ me Hours = $(30 + 3)$ | (5+2) - 40 = 2 (5+1.75) - 40 = -3.25 (0) |
| Each Driver's Cost = | (Driver's Actua Employee's Ho Overtime Hourl Customer Amo | l Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours x urly Rate (1-6)) + (Driver Trip Overtime Hours x Employee's y Billing Rate (1-6)) + Driver's Employee Expense for the Trip + unt (entered in the Customer Screen). |
| Kathy Unger's Total C Sandy Werser's Total | Charge = $(35 \times .6)$ Charge = $(36 \times .6)$ | + $(2-2 \times 13) + (2 \times 20) + 0 + 0 = 61 + $(2 - 0 * 14.5) + (0 \times 22) + 35 + 0 = 85.6 |
| (Notice that the Minim | um Hours of 2 wa | s used for Sandy instead of her actual hours of 1.75) |
| Total Driver Amount Total Driver Amount | = Total of (Eac = \$61 + \$85.6 = | h Driver's Cost) for All Drivers that Performed the Field Trip = \$146.60 |
| Trip Amount Trip Amount | = Total Driver= \$146.60 + \$5 | Amount + Total of 5 Flat Miles 0 + \$20 + \$0 + \$0 + \$0 = \$216.60 |



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)



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

| | Example Billing Rate: | | Example Customer: | | | |
|--|--|---|--|--|--|--|
| | Billing Rate: INDIST Billing Instructions: RA Mileage Rate: \$ 60 | TE | Customer Name: Echo Mountain Customer Amount: 0 | | | |
| Hourly Rate: \$15.00 # of Minimum Miles: 0 Minimum Hours: 2 Minimum Amount: 0 | | | Employee Rate to use: 1 | | | |
| | Example Employees: | | | | | |
| | Driver Name: Kathy Un | ger Di Di Av Fi | river Hourly Billing Rate #1: \$13.00 river Hourly Daily Overtime Billing Rate #1: \$18 verage non field trip hours: 35 eld Trip Hours Before Field Trip being Billed: 5 eekly 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 = | | | | |
| | | ((1 otal Aver Field Trips t (Driver's Ac Limit (Set ir | age Weekly Hours entered in Employee Hours Screen) + (Hours of all hat the Driver is Assigned to Taken BEFORE This Field Trip) + tual Hours of Field Trip Being Billed)) - Weekly Overtime Hours h 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 Ac Employee's Daily Overti Trip + Custo | ctual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours x Hourly Rate (1-6))+ (Driver Trip Daily Overtime Hours x Employee's ime Hourly Billing Rate (1-6)) + Driver's Employee Expense for the omer Amount (entered in the Customer Screen). | | | |
| | Kathy Unger's Total Charge = $(35 \times .6) + (2 - 2 \times 13) + (2 \times 18) + 0 + 0 = 57 Sandy Werser's Total Charge = $(36 \times .6) + (2 - 0 \times 14.5) + (0 \times 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 Driver Amount = | = Total of (= \$57 + \$85 | Each Driver's Cost) for All Drivers that Performed the Field Trip $5.6 = 142.60 | | | |
| | Trip Amount = | = Total Driv | ver Amount + Total of 5 Flat Miles | | | |

| inp / mount | | Total Driver Findunt + Total of 5 Flat Miles |
|-------------|---|---|
| Trip Amount | = | \$142.60 + \$50 + \$20 + \$0 + \$0 + \$0 = \$212.60 |



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 Dr | iver 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 Rat #1) + (Driver's Actual Miles (greater than the miles limit) Mileage Rate #2) + (Driver's Actual Hours (up to the hour Employee's Hourly Rate #1) + (Driver's Actual Hours (gre hours limit) x Employee's Hourly Rate #2) + Driver's Emp for the Trip + Customer Amount (entered in the Customer | | Actual Miles (up to the miles limit) x Billing Rate's Mileage Rate river's Actual Miles (greater than the miles limit) x Billing Rate's Rate #2) + (Driver's Actual Hours (up to the hours limit) x ee's Hourly Rate #1) + (Driver's Actual Hours (greater than the nit) x Employee's Hourly Rate #2) + Driver's Employee Expense rip + 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 | e Customer: | | | | |
| Billing Rate: INDIST | Custome | r Name: Echo Mountain | | | | |
| Billing Instructions: STI | EP RATES Custome | er 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 | | | | | | |

(continued on next page)

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 \times .6) + (0 \times 0) + (2 \times 15) + (2 \times 20) + 0 + 0 = 91 Sandy Werser's Total Charge = $(36 \times .6) + (0 \times 0) + (2 \times 15) + (2.25 \times 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 |

| 1 | | |
|-------------|---|---------------------------------------|
| Trip Amount | = | 202.60 + 50 + 20 + 0 + 0 + 0 = 272.60 |



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 Mil | | |
| | If the Driver's Actual Hours are less than th entered in the Billing Rate Screen then T.O. Minimum Hours by the Hourly Rate rather | | 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: INDIS Field Trip Customer: Echo Mc Flat Amount #1: \$50 #2: \$20 | ST Number of Drivers puntain #3: \$0 #4: \$0 #5: \$0 | : 2 |
|--|---|--|--------------------|
| Driver 1: Kathy Unger | Actual Miles: 35 | Actual Hours: 3 Overtime Wait Time: 0 | Driver Expense: 0 |
| Driver 2: Sandy Werser | Actual Miles: 36 Wait Time: 1 | Actual Hours: 3.25 Overtime Wait Time: 0 | Driver Expense: 35 |
| Example Billing Rate: Billing Rate: INDIST | Example Cu Customer Na | stomer: me: Echo Mountain | |

| Example Dining 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 | | |

(continued on next page)



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 Hourd 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 W Time Hourly Rate) + Driver's Employee Expense for the Trip + Customer Am (entered in the Customer Screen). | | | | |
|--|--|--|--|--|
| Kathy Unger's Total Charge = $(35 \times .6) + (3 \times 15) + (1 \times 10) + (0 \times 12) + 0 + 0 = 76 Sandy Werser's Total Charge = $(36 \times .6) + (3.25 \times 15) + (1 \times 10) + (0 \times 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 | | | | |



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 Hours x Employe Time x E Employe Custome | Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Employee Hourly Rate (1-6)) + (Employee's Wait Time x ee's Wait Time Hourly Rate (1-6)) + (Employee's Overtime Wait Employee's Overtime Wait Time Hourly Rate (1-6)) + Driver's ee Expense for the Trip + Customer Amount (entered in the r 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 | e of hov | w this form | nula would work: | |
| Example Field Trip: | Field Trip Billing Rate: INDISTNumber of Drivers: 2Field Trip Customer: Echo MountainFlat 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)



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: Billing Rate: INDIST Billing Instructions: Employee Rate With OT **Example Customer:** Customer Name: Echo Mountain 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

Field Trip Calculation:

| Each Driver's Cost = | = (| Driver's Actual Miles x Billing Rate's Mileage Rate) + (Driver's Actual Hours x |
|-----------------------|-----|---|
| | I | Employee's Hourly Rate (1-6))+ (Employee's Wait Time x Employee's Wait Time |
| | ł | Hourly Rate (1-6)) + (Employee's Overtime Wait Time x Employee's Overtime |
| | I | <i>Wait Time Hourly Rate (1-6))</i> + Driver's Employee Expense for the Trip + |
| | (| Customer Amount (entered in the Customer Screen). |
| Kathy Unger's Total C | Cha | rge = (35 x .6) + (4 x 13) + (1 x 10) + (0 x 0) + 0 + 0 = \$83 |
| Sandy Werser's Total | Cha | $arge = (36 \times .6) + (4.25 \times 14.5) + (1 \times 11) + (0 \times 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 |



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 Customer:

Customer Amount: 0

Customer Name: Echo Mountain

Example Billing Rate:

Billing Rate: INDIST Billing Instructions: RATE 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).

| T.O.M Transp | ortation Operations M | anager | | | | _ 🗆 |
|-------------------|--|--|--------------------------|--------------------------|------------------------|---|
| | Field Trip | Field Trip Re 1853 | juest #: | | Assigned | |
| General | Instructions | Assignment | Billing | | Other | 1 |
| Field Trip #: | 9782 | | Dates / Times I | ⁰ assengers / | Miles / Purpos | <u>الــــــــــــــــــــــــــــــــــــ</u> |
| Request Date: | 10/21/1999 🖬 Dr | op / Return: 🗖 | # of Ad | ults : | 12 | |
| Customer: | 54 DESERT SPR | INGS ELEM. | # of Stud | ents: | 67 | |
| Contact: | Wintroub | | # of Hand | icap: | 0 | |
| Destination: | 324 PHOENIX ZO | | Estimated 7 | Time: | 4.75 | Calc |
| Out of Town: 🗖 | 455 N. GALVIN PKWY | | Estimated M | liles: | 55.00 | |
| Split | Fund: | 9 • | Purpose : | | | |
| Брик | | | | | | |
| OK Save | Addit. Auto Trip Assign I Dates Drivers | Trip Print Driver Trip Info Ticket | rint Bills Est. Pymts | Bill Trip | Cancel Tri Trip Bid | P Exit |
| | Figure 5-15. The Click the Bill Trip only this field trip. | e Bill Trip Button button to bill | | | | |

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)

| 🛢 T.O.M Transp | ortation Operations Manager | | | _ 🗆 × |
|-----------------|--|---|--|---|
| | Field Trip | I d Trip Request #: 1853 | Assigned | Billed 4/19/00 |
| General | Instructions Assig | gament Billing | 5 Other | |
| Field Trip #: | 9782 | Dates / Times | Passengers / Miles / Purp | ose |
| Request Date: | 10/21/1999 📰 Drop / Retu | rn: 🗖 🛛 # of # | Adults : 12 | |
| Customer: | 54 DESERT SPRINGS ELE | M. # of St | udents: 67 | |
| Contact: | Wintroub | # of Ha | ndicap: 0 | |
| Destination: | 324 PHOENIX ZOO | Estimated | d Time: 4.75 | Calc |
| Out of Town: | 455 N. GALVIN PKWY | Estimated | Miles: 55.00 | |
| Snlit | Fund: | Purpose : | | |
| | | | | |
| OK Save | Addit.AutoTripITripAssignDriverDatesDriversInfo | Print Trip Ficket Print Est. Bills and Pymts | Print Cancel T Bill Trip | rip Bids Exit |
| | | | Ī | |
|] to f | The Bill Trip button is chang prevent you from accidenta eld trip. | ed to say 'Print Bill' llly re-billing the | The word the date the date the was billed on the sci | l 'Billed' and hat the field trip d is displayed reen. |

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.

| 🕫 Recalculate Trip Amount | X |
|---|--|
| Recalculate Trip Amo | unt |
| Note: This field trip has already been b You've just changed a piece of informat field trip that will change the amount t should be billed for or how this trip am reported. T.O.M. will now recalculate t of the trip and re-record this invoice an | illed. tion on this his trip ount is he amount nount. |
| OK | Cancel |

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.

| 📰 T.O.M Trans | portation Operations Manager | |
|---------------|---|--|
| | Field Trip | Request #: Assigned Billed 853 4/19/00 |
| General | Instructions Assignment | Billing Other |
| Field Trip #: | 9782 | Dates / Times Passengers / Miles / Purpose |
| Request Date: | 10/21/1999 🔜 Drop / Return: 🗆 | # of Adults : 12 |
| Customer: | 54 DESERT SPRINGS ELEM. | # of Students: 67 |
| Contact: | Wintroub | # of Handicap: 0 |
| Destination: | 324 PHOENIX ZOO | Estimated Time: 4.75 Calc |
| Out of | 455 N. GALVIN PKWY | Estimated Miles: 55.00 |
| I own: | | Purpose : |
| Split | Fund: 9 • | |
| OK Save | Addit.AutoTripPrintTripAssignDriverTripDatesDriversInfoTicket | Print Bills and Pymts Print Cancel Trip Bill Bill Trip Bids Exit |
| | Click to ins reprint the I Invoice. | truct T.O.M. to Field Trip |

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.



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.





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.

| Mass | Billing of | Field Trips | Number of t | rips selected: | ▲ 543 | | | |
|---|---|---|--|--|--|--|--|--|
| Dates a | nd General | Assignment Billing | Other Sorting | | | | | |
| Depa | arture Date : | Range: From: | <u></u> | To: | Date: | s: | | _ . |
| Cu | stomer: | | | | | | | |
| Des | tination: | | | Prin | t Invoices: | ⊽ ◀── | | |
| | | | | | | | | |
| 10259 3624 3531 3479 3408 3407 3678 3055 3433 | FOOTHILL GOLD DUS GOLD DUS GOLD DUS GOLD DUS GOLD DUS GOLD DUS GOLD DUS GREENW/ | S ELEM. ST ELEM. ST ELEM. ST ELEM. ST ELEM. ST ELEM. HADOWS MIDDLE ST ELEM. SY MIDDLE | DEER VALLEY AI PIONEER VILLAG Desert Center at P ARIZONA STATE HEARD MUSEUM HEARD MUSEUM ARIZONA STATE CROW AGRICULT GranCare Center | RPORT iE CAPITAL 1 1 UNIVERSITY TURAL FACILITY | 2/16/00 12/17/99 4/6/00 2/9/00 4/26/00 4/25/00 1/13/00 2/25/00 12/9/99 | No No No No No No No No | No No No No No No No No No | No Yes No No No Yes No Yes Yes |
| 9994 ▲ _ Find 2 | | S ELEM. | PHOENIX ZOO | | 4/26/00 | No | No] | No ▼ ▶ Exit |
| | | | All unbilled field that have been fou the search are disp in this list. | trips und in played | If Print Ir field trips process w If unchec | voices billed vill hav ked no | is check in the m e an invoices | ked all ass billin oice print s will prir |
| | | Click the Bill A to bill all the se unbilled field the | Ill button lected ips. | | | | | |

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.



| 🗃 Mass I | Billing | | | | | × | | | | |
|--|---|--------------------------------|-------------|--------|----------|--------|--|--|--|--|
| Mass | Mass Billing of Field Trips Number of trips selected: 543 | | | | | | | | | |
| Dates a | nd General Assignment Billing | Other Sorting | | | | | | | | |
| Departure Date Range: From: To: To: Dates: T | | | | | | | | | | |
| Cu | stomer: | | | , | | | | | | |
| Dec | tination: | | | - | | | | | | |
| Desi | | Prin | t Invoices: | | | | | | | |
| Triett | | Destination | Dopt Date | Dillod | Canceled | Acci . | | | | |
| 10259 | | | 2/16/00 | No | No | No | | | | |
| 9624 | GOLD DUST FLEM | 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 | | | | E | xit | | | | |

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).

| 🔀 Mass I | Billing | | | | | × |
|----------|-------------------------------|--------------------------------|-----------|--------|----------|------|
| Mass | Billing of Field Trips | Number of trips selected: | 543 | | | |
| Dates a | nd General Assignment Billing | Other Sorting | | | | |
| Selec | ted Schedule: | | | | | |
| Selec | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| Triptt | Customer | Destination | Dept Date | Dillod | Canceled | |
| 10259 | | | 2/16/00 | No | No | |
| 9624 | GOLD DUST FLEM | PIONEEB VILLAGE | 12/17/99 | No | No | |
| 9531 | GOLD DUST FLEM | 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 / | Bill All | | | | E | xit |
| - 100 | | | | | | |

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).

| 🔡 Mass | 🖀 Mass Billing | | | | | | | | | | | |
|--------------|---|--------------------------------|------------|--------|----------|--------|--|--|--|--|--|--|
| Mass | Mass Billing of Field Trips Number of trips selected: 543 | | | | | | | | | | | |
| Dates a | Dates and General Assignment Billing Other Sorting | | | | | | | | | | | |
| | Fund: | | | | | | | | | | | |
| Bill Cust | Billing Customer | | | | | | | | | | | |
| 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. | PHOENIXZOO | 4/26/00 | No | No | No 🚬 | | | | | | |
| | | | | | | | | | | | | |
| Find | All Bill All | | | | E | xit | | | | | | |

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).

| 🏭 Mass B | Billing | | | | | × | | | | | |
|--|---|--------------------------------|------------|--------|----------|--------|--|--|--|--|--|
| Mass I | Mass Billing of Field Trips Number of trips selected: 543 | | | | | | | | | | |
| Dates and General Assignment Billing Other Sorting | | | | | | | | | | | |
| Selected Category: | | | | | | | | | | | |
| Selected Grade: Selected Division: | | | | | | | | | | | |
| | , | - | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| 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 | GULD DUST ELEM. | ARIZUNA 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 A | II Bill All | | | | E | xit | | | | | |

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.



| 🖼 Mass Billing | | | | | | | | | | |
|--|--|-----------------|---------|--------------|---------------------|------------|--------|----------|--------|--|
| Mass] | Mass Billing of Field Trips Number of trips selected: 403 | | | | | | | | | |
| Dates and General Assignment Billing Other Sorting | | | | | | | | | | |
| Sort b Sort b | Sort by #1: Customer • Order By #1: Descending • Use standard T.O.M. Invoice Sort by #2: Vehicle Type • Order By #2: Descending • Image: Sort by #2: Sort by #2: Descending • Image: Sort by #2: Image: Sort by #2: Descending • Image: Sort by #2: Image: Sort by #2: </th | | | | | | | | | |
| Sort b | y #3: | Vehicle Type | • | Order By #3: | | _INVOICE | | | ~ | |
| Trip# | Custon | ner | | Destination | | Dept. Date | Billed | Canceled | Assi 🔺 | |
| 8975 | WHIS | PERING WIND/EA | GLE CLI | SUNNYSLOP | E POOL | 7/13/99 | No | No | Yes | |
| 8833 | WHIS | PERING WIND/EA | GLE CLI | ICE CHALET | | 7/28/99 | No | No | Yes - | |
| 10920 | WHIS | PERING WIND ELE | EM. | SEARS-KAY F | IUIN | 4/20/00 | No | No | Yes | |
| 10417 | WHIS | PERING WIND ELE | EM. | MESA SOUTH | IWEST MUSEUM | 3/24/00 | No | No | Yes | |
| 9541 | WHISI | PERING WIND ELE | EM. | HERBERGER | THEATER | 4/13/00 | No | No | Yes | |
| 10916 | VISTA | VERDE MIDDLE | | MOUNTAIN S | IDE | 4/6/00 | No | No | Yes | |
| 10983 | VISTA | VERDE MIDDLE | | OASIS WATE | RWORLD | 5/17/00 | No | No | No | |
| 10930 | VISTA | VERDE MIDDLE | | NURTH CANY | 'UN HIGH SCHUUL | 4/18/00 | No | No | Yes | |
| 10902 | VISTA | VERDE MIDDLE | | LACTUS VIEV | | 4/6/00 | No | No | Yes | |
| 10896 | VISTA | VERDE MIDDLE | | | ARIZUNA UNIVERSI II | 4/29/00 | NO | NO | Yes -1 | |
| 10/9/ | INSTA | VERUE MIDULE | | ARIZUNA REI | -OBLIC/GAZETTE-NU | 4/0/00 | INO | INO | res 🕶 | |
| | | | | | | | | | | |
| Find A | JII | Bill All | | | | | | E | xit | |

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.





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*.

| Total Hoarty Rad(4)1/Hoarts Total Minety Flat Amount Flat Flat Amount Flat Flat Amount | Trial Houry Total Mails Flat Amount #1 Flat Amount #3 Flat Amount #3 Flat Amount #3 Trial Amount #3 Tria Amount #3 Trial Amount #3 | Total Hours / Hourly Total Miles / Flat Amount #1 Flat Amount #2 Total eff 10.00 Hourly Rate: 10/15/99 N Allow to be Billed 35.50 Milesge Amount #1 R R Amount #2 R R R R R R R R R R R R < |
|---|--|--|
| 79 DESERT SHADOWS MIDDLE MARCOPA COUNTY HOSPITAL 2.5 47 0 0 0 0 X signed Date of Operature: 101599 A NECOPA COUNTY HOSPITAL 2.5 47 0 0 0 0 X signed Date of Operature: 101599 A Networb Billed 13.00 0.60 0.60 0 0 0 0 0 X signed Barti Fattericins: Software 1.00 Nitesy Rate #2: 1.00 Total Hours: 0.00 Total Wait Hours: 0.00 0 0 0 0 X statility Interactions: Software 1.00 Nites: 1.00 Nites: 1.00 Nites: 1.00 Nites: 1.00 X statil Hours: 0.00 Rate : 1.00 Nites: 0.00 Rate : 1.00 Nite Nation: 0.00 X statil Hours: 0.00 Rate : 0.00 Criat Hours: 0.00 Cale Hours: 0.00 Nation: 0.00 X statil Hours: 0.00 Rate : 0.00 Criat Hours: 0.00 Cale Hours: 0.00 Cale Hours: 0.00 X statil Hours: 0.00 Rate : 0.00 | 679 DESERT SHADOWS MIDDLE MARICOPA COUNTY HOSPITAL 2.5 47 0 0 0 67 Billed Dase Of Deprinter: 10.1599 Allow to be Billed 13.00 0.660 | $ \begin{array}{ c c c c c c c c c c c c c c c c c c c$ |
| N Billed Date of Departure. $0/1599$ A low to be Billed 1300 0.60 0.60 0.00 <th>No. Billed Date of Departure: 01599 Allow to be Billed 1300 060 060 00 00 00 00 00 00 00 00 000 000</th> <th>of Departure: $10/15/99$ $\sqrt{15}/99$ $\sqrt{15}/90$ 0.60 0.00 0.00</th> | No. Billed Date of Departure: 01599 Allow to be Billed 1300 060 060 00 00 00 00 00 00 00 00 000 | of Departure: $10/15/99$ $\sqrt{15}/99$ $\sqrt{15}/90$ 0.60 0.00 |
| A safeted Biling fractuctions Step Rates: 100 Houry Rates 35.50 43.00 0 Total Wait Amit: 0.00 Starts: 0.00 Vait Huy Rate: 0.00 Total OT Wait Amit: 0.00 Announ: 0.00 Annou: | No Assigned Billing Instructions Step Rates 35.0 43.00 Total Wait Amt: 0 0 1 out Nait Amt: <td>Ig Instructions: Step Rates 35.50 43.00 0 1: 1.00 Hourly Rate #2: 15.00 Total Wait Hours: 0.00 Wait Hrly Rate: 0.00 Total Wait Amt: 1: 10.00 Mileage Rate #2: 1.00 Total Ourly Rate: 0.00 Total Wait Amt: JSAN Cust. Hours: 0.00 Bill Hours: 2.50 Rate: 13.00 Hrly Amount: 35.50 Emp. Expense: JSAN Cust. Hours: 0.00 Bill Hours: 2.50 Rate: 13.00 Hrly Amount: 35.50 Emp. Expense: . 0.00 Miles: 47.00 Rate: 0.60 Mile Amount: 35.50 Emp. Expense: . 0.00 Miles: 0.00 Cate: 0.00 OT Amount: 28.20 Min Amount: . 0.00 Miles: 0.00 OT Hours: 0.00 OT Amount: 0.00 Cate: Amount: . 0.00 Amount: 0.00 OT Amount: 0.00 Cate. Amount: . 0.00 Rate: 0.00 OT Amount: 0.00<</td> | Ig Instructions: Step Rates 35.50 43.00 0 1: 1.00 Hourly Rate #2: 15.00 Total Wait Hours: 0.00 Wait Hrly Rate: 0.00 Total Wait Amt: 1: 10.00 Mileage Rate #2: 1.00 Total Ourly Rate: 0.00 Total Wait Amt: JSAN Cust. Hours: 0.00 Bill Hours: 2.50 Rate: 13.00 Hrly Amount: 35.50 Emp. Expense: JSAN Cust. Hours: 0.00 Bill Hours: 2.50 Rate: 13.00 Hrly Amount: 35.50 Emp. Expense: . 0.00 Miles: 47.00 Rate: 0.60 Mile Amount: 35.50 Emp. Expense: . 0.00 Miles: 0.00 Cate: 0.00 OT Amount: 28.20 Min Amount: . 0.00 Miles: 0.00 OT Hours: 0.00 OT Amount: 0.00 Cate: Amount: . 0.00 Amount: 0.00 OT Amount: 0.00 Cate. Amount: . 0.00 Rate: 0.00 OT Amount: 0.00< |
| | # of Hours @ Rate1: 1.00 Hondy Rate #2: 1.500 Total Wait Hours: 0.00 Wait Hirly Rate: 0.00 Total Wait Amt: 0.00 Total Wait Amt: 0.00 Amt: 0.00 Total Wait Amt: 0.00 Amt: | 1: 1.00 Hourly Rate #2: 15.00 Total Wait Hours: 0.00 Wait Hrly Rate: 0.00 Total Wait Amt: 1: 10.00 Mileage Rate #2: 1.00 Total Ours: 0.00 Wait OT Hrly Rate: 0.00 Total Wait Amt: JSAN Cust. Hours: 0.00 Bill Hours: 2.50 Rate: 13.00 Hrly Amount: 35.50 Emp. Expense: JSAN Cust. Hours: 16.00 Bill Hours: 2.50 Rate: 13.00 Hrly Amount: 35.50 Emp. Expense: . 2.50 Miles: 47.00 Rate: 0.60 Mile Amount: 35.20 Emp. Expense: . 0.00 Miles: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 28.20 Min Amount: . 0.00 Miles: 0.00 OT Hours: 0.00 OT Amount: 0.00 Calc. Amount: . 0.00 Rate: 0.00 OT Amount: 0.00 Calc. Amount: 0.00 |
| | # of Miles @ Rate1: 10.0 Miles @ Rate #2: 10.0 Total OT Wait Hours: 0.00 Wait OT Hipk Rate: 0.00 Total OT Wait Arm: 0.00 Mait OT Hipk Rate: 0.00 Amit Barnes: 0.00 0.00 | I: 10.00 Mileage Rate #2: 1.00 Total OT Wait Hours: 0.00 Wait OT Hrly Rate: 0.00 Total OT Wait Amt: Amt: Amt: Amteria Amteri |
| $ \frac{\text{SAUNDERS. SUSAN}}{Actual: Hours: 250 Miles: 47.00 Miles: 16.00 Bill Miles: 47.00 Rate: 13.00 Hily Amount: 35.50 Emp. Expense: 0.00 Amt. Billed Miles: 47.00 Rate: 13.00 Hily Amount: 35.50 Miles: 47.00 Miles: 16.00 Miles: 16.00 Rate: 0.00 OT Amount: 28.20 Min Amount: 78.50 For Driver Wait: Hours: 0.00 Miles: 0.00 Amount: 0.00 Cale. Amount: 78.50 For Driver 78.50 Miles: 47.00 Miles: 10.00 Amount: 0.00 OT Amount: 78.50 Miles: 47.00 Miles: 10.00 Amount: 0.00 OT Amount: 78.50 For Driver 78.50 Miles: 47.00 Miles: 0.00 Amount: 0.00 OT Amount: 0.00 OT Amount: 78.50 For Driver 79.00 For Driver 70.00 For Driver 76.75 For Driver 79.00 For Driver 76.75 For Driver 70.00 For Driver 73.00 For Driver 710.00 For $ | | JSAN Cust. Hours: 0.00 Bill Hours: 2.50 Rate: 13.00 Hrly Amount: 35.50 Emp. Expense: :: 2.50 Miles: 47.00 Miles: 16.00 Bill Miles: 47.00 Rate: 0.60 Mile Amount: 28.20 Min Amount: :: 0.00 Miles: 0.00 Rate: 0.00 OT Amount: 28.20 Min Amount: :: 0.00 Miles: 0.00 Rate: 0.00 OT Amount: 0.00 Cale. Amount: : 0.00 Rate: 0.00 OT Hours: 0.00 Cale. Amount: 0.00 |
| | $ \begin{array}{ c c c c c c c c c c c c c c c c c c c$ | 2.50 Miles: 47.00 Miles: 16.00 Bill Miles: 47.00 Rate: 0.60 Mile Amount: 28.20 Min Amount: i: 0.00 Miles: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 28.20 Min Amount: i: 0.00 Miles: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Cale. Amount: i: 0.00 Rate: 0.00 OT Amount: 0.00 Cale. Amount: 0.00 |
| Min. Hours: 0.00 Mine: 0.00 Amount: 0.00 Thenus: 0.00 CAthount: 0.00 CT Amount: 78,50 Wait. Hours: 0.00 Rate: 0.00 CT Amount: 0.00 CT Amount: 78,50 Wait. Hours: 0.00 Rate: 0.00 CT Amount: 0.00 CT Amount: 78,50 Min. Billed NoRTH CANYON HICH SCHOOL HORIZON HICH SCHOOL Allow to be Billed 13,20 0.0 CAL 0 0 71 0 0 0 52.5 Mait Billed Date of Departure: 1.000 Mileage Rate #2: 1.000 Total Wait Amit. 0 <t< td=""><td>Min: Hours:0.00Mile:0.00Mile:0.00Mile:0.00CT Hours:78.5078.50Wait: Hours:0.00Rate:0.00CT Hours:0.00CT Amount:0.00Cale. Amount:78.50Wait: Hours:0.00Rate:0.00CT Hours:0.00CT Amount:0.00Cale. Amount:78.50Mait: Hours:0.00Rate:10.13990.0NORTH CANYON HIGH SCHOOLHORIZON HIGH SCHOOL10.2571000Mait: Hours:10.1399North Canoni:10.13990.0Wait High Rate:10.00Total Wait Amt0.00Mait: Hours:10.00Houry Rate #2:1.00Total Vait Hours:0.00Wait High Rate:0.00Total Wait Amt0.00Mart: Hours:2.25Miles:0.00Mile: Hours:0.00Mile Amount:10.07Mile Amount:0.00Mait: Hours:0.00Miles:0.00Mile:0.00Mile Amount:0.00Mile Amount:0.00Min: Hours:0.00Miles:0.00Mile: Anount:0.00Mile Amount:0.00Mile Amount:0.00Mait: Hours:0.00Miles:0.00Mile: Anount:0.00Mile Amount:0.00Mile Amount:0.00Mart: Hours:0.00Miles:0.00Mile: Anount:0.00Mile Amount:0.00Mile Amount:0.00Mait: Hours:0.00Miles:41.00Mile: Anount:0.00</td><td>:: 0.00 Miles: 0.00 Amount: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Calc. Amount: :: 0.00 Rate: 0.00 Amount: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00</td></t<> | Min: Hours:0.00Mile:0.00Mile:0.00Mile:0.00CT Hours:78.5078.50Wait: Hours:0.00Rate:0.00CT Hours:0.00CT Amount:0.00Cale. Amount:78.50Wait: Hours:0.00Rate:0.00CT Hours:0.00CT Amount:0.00Cale. Amount:78.50Mait: Hours:0.00Rate:10.13990.0NORTH CANYON HIGH SCHOOLHORIZON HIGH SCHOOL10.2571000Mait: Hours:10.1399North Canoni:10.13990.0Wait High Rate:10.00Total Wait Amt0.00Mait: Hours:10.00Houry Rate #2:1.00Total Vait Hours:0.00Wait High Rate:0.00Total Wait Amt0.00Mart: Hours:2.25Miles:0.00Mile: Hours:0.00Mile Amount:10.07Mile Amount:0.00Mait: Hours:0.00Miles:0.00Mile:0.00Mile Amount:0.00Mile Amount:0.00Min: Hours:0.00Miles:0.00Mile: Anount:0.00Mile Amount:0.00Mile Amount:0.00Mait: Hours:0.00Miles:0.00Mile: Anount:0.00Mile Amount:0.00Mile Amount:0.00Mart: Hours:0.00Miles:0.00Mile: Anount:0.00Mile Amount:0.00Mile Amount:0.00Mait: Hours:0.00Miles:41.00Mile: Anount:0.00 | :: 0.00 Miles: 0.00 Amount: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Calc. Amount: :: 0.00 Rate: 0.00 Amount: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00 |
| Wait:Hours:0.00Rate:0.00NRTH CANYON HIGH SCHOOLMORITION10.25710.0078.5073.00Mait:Date of Departure:10/13/99MORITION HIGH SCHOOLHOKIZON HIGH SCHOOLMORITION 60.600.6600.6600.66000Mait:Iouro (files)Step Rates:10.00Hourity Rate10.00Total Vait Hours:0.00Vait HIV Rate:0.00Total Wait Amt:0.000.66000Mait:Iouro (files)Step Rates:1.00Total Vait Hours:0.00Wait HIV Rate:0.00Total Wait Amt:0.0000Mait:Iouros:S.23Miles:1.00Total Vait Hours:5.25Rate:1.00Yait Hours:0.00Total Wait Amt:0.00Mait:Hours:0.00Miles:0.00Mile Mount:7.675Emp. Expense:0.00Amt. BilledMait:Hours:0.00Miles:0.00Miles:0.00Mile Mount:7.675Emp. Expense:0.00Amt. BilledMait:Hours:0.00Miles:0.00Miles:0.00Mile Mount:7.675Emp. Expense:0.00Amt. BilledMait:Hours:0.00Miles:0.00Miles:0.00Mile Mount:7.675Emp. Expense:0.00Amt. BilledMait:Hours:0.00Miles:0.00Miles:0.00Mile Mount:7.675Emp. Expense:0.00Amt. Billed </td <td>Wait: Hours:0.00Rate:0.00Amount:0.00OT Hours:0.00Rate:0.0078.3Mait: Hours:Date of Departure:10.1399MoRTH CANYON HIGH SCHOOLHORIZON HIGH SCHOOLHORIZON HIGH SCHOOLHORIZON HIGH SCHOOL0.0500.6600.66000</td> <td>: 0.00 Rate: 0.00 Amount: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00</td> | Wait: Hours:0.00Rate:0.00Amount:0.00OT Hours:0.00Rate:0.0078.3Mait: Hours:Date of Departure:10.1399MoRTH CANYON HIGH SCHOOLHORIZON HIGH SCHOOLHORIZON HIGH SCHOOLHORIZON HIGH SCHOOL0.0500.6600.66000 | : 0.00 Rate: 0.00 Amount: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00 |
| | | |
| Note:BilledDate of Departure: $10/13/99$ Note be Billed 13.00 0.60 0.60 0.60 0.60 0.60 0.60 0.60 0.60 0.60 0.00 <td>Note:BilledDate of Departure:10/13/99NAllow to be Billed13.000.600.600.60000A signedBilling Instructions:Step Rates:10.00Hourty RateX:13.00Nait Hrly Rate:0.00Total Wait Amt:0.00# of Hours @ Rate1:1.00Hourty Rate #2:1.00Total Wait Hours:0.00Wait Hrly Rate:0.00Total Wait Amt:0.00# of Hours @ Rate1:1.000Mileage Rate #2:1.000Total Wait Hours:0.00Wait OT Hrly Rate:0.00Total Wait Amt:0.00# of Miles @ Rate1:1.000Mileage Rate #2:1.000Bill Hours:5.25Rate:0.00Total Wait Amt:0.00Actual:Hours:0.00Miles:0.00Bill Miles:3.000Rate:0.00Cate Amount:0.00Amt. BWin:Hours:0.00Miles:0.00Miles:5.00Rate:0.00Cate Amount:0.00Amt. BWait:Hours:0.00Rate:0.00Bill Miles:3.000Rate:0.00Cate Amount:0.00Amt. BWait:Hours:0.00Rate:0.00Cate Amount:0.00Cate Amount:0.00Amt. BWait:Hours:0.00Rate:0.00Cate Amount:0.00Cate Amount:0.00Amt. BWait:Hours:0.00Miles:0.00Cate Amount:0.00Cate Amount:0.00Amou</td> <td>TH CANYON HIGH SCHOOL HORIZON HIGH SCHOOL 10.25 71 0</td> | Note:BilledDate of Departure:10/13/99NAllow to be Billed13.000.600.600.60000A signedBilling Instructions:Step Rates:10.00Hourty RateX:13.00Nait Hrly Rate:0.00Total Wait Amt:0.00# of Hours @ Rate1:1.00Hourty Rate #2:1.00Total Wait Hours:0.00Wait Hrly Rate:0.00Total Wait Amt:0.00# of Hours @ Rate1:1.000Mileage Rate #2:1.000Total Wait Hours:0.00Wait OT Hrly Rate:0.00Total Wait Amt:0.00# of Miles @ Rate1:1.000Mileage Rate #2:1.000Bill Hours:5.25Rate:0.00Total Wait Amt:0.00Actual:Hours:0.00Miles:0.00Bill Miles:3.000Rate:0.00Cate Amount:0.00Amt. BWin:Hours:0.00Miles:0.00Miles:5.00Rate:0.00Cate Amount:0.00Amt. BWait:Hours:0.00Rate:0.00Bill Miles:3.000Rate:0.00Cate Amount:0.00Amt. BWait:Hours:0.00Rate:0.00Cate Amount:0.00Cate Amount:0.00Amt. BWait:Hours:0.00Rate:0.00Cate Amount:0.00Cate Amount:0.00Amt. BWait:Hours:0.00Miles:0.00Cate Amount:0.00Cate Amount:0.00Amou | TH CANYON HIGH SCHOOL HORIZON HIGH SCHOOL 10.25 71 0 |
| A signedBilling Instructions: a for the instructions: is to flow is of the instructions: is to flow is of the instructions: is for historic flow is the instructions: is of the instructions: | A seriesDescription< | of Denortine: 10/13/00 V Alloute he Billed 13.00 0.60 0 |
| μ of Hours (B) rate in the formation of the formation o | m of Hours m of the form m | or interference and a strain a I a strain strain a st |
| # Of Hours @ Katel: 1.00 Houry Kate #2: 1.5.00 Total Wait Hrly Kate: 0.00 Total Wait Amt: 0.00 Total Wait Amt: 0.00 # of Miles @ Ratel: 10.00 Mileage Rate #2: 1.00 Total OT Wait Milea; 0.00 Total OT Wait Amt: 0.00 # of Miles @ Ratel: 10.00 Mileage Rate #2: 1.00 Total OT Wait Hours: 5.25 Rate: 13.00 Hrly Amount: 76.75 Emp. Expense: 0.00 Ant. Billed Actual: Hours: 5.25 Miles: 0.00 Rate: 0.30 Rate: 0.30 Rate: 0.30 Ant. Billed Actual: Hours: 0.00 Miles: 0.00 Rate: 0.30 Rate: 0.30 Rate: 0.30 Ant. Billed Wait: Hours: 0.00 Amount: 0.00 Rate: 0.30 Rate: 0.30 Rate: 0.30 Rate: 0.30 Ant. Billed 30.30 Mules: 41.00 Rate: 0.30 Cate. Amount: 102.75 102.75 102.75 102.75 102.75 102.75 102.75 102.7 | # of Hours @ Katel: 1.00 Nouly Kate #2: 15.00 Total Wait Hours: 0.00 You Huy Kate: 0.00 Total Wait Amt: 0.00 # of Miles @ Rate I: 10.00 Mileage Rate #2: 1.00 Total OT Wait Amt: 0.00 Total Wait Amt: 0.00 # of Miles @ Rate I: 10.00 Mileage Rate #2: 1.00 Total OT Wait Hours: 5.25 Rate: 13.00 Hrly Amount: 76.75 Emp. Expense: 0.00 Amt. B Main: Hours: 5.25 Miles: 0.00 Rate: 13.00 Hrly Amount: 10.0 Amt. B 0.00 Amut. B 0.00 Amount: 0.00 Amt. B 0.00 Amount: 0.00 Amt. B 0.00 Amount: | |
| # Of Mules (G Fater: 10.00 Initial (Mail Facer: 0.00 Wait I (Mail Facer: 0.00 Note (Mail Facer: 0.00 Note (Mail Facer: 0.00 And (Mail Facer: 0.00 Case: Anount: 0.00 Case: 0.00 Anount: 0.00 And (Mail Facer: 0.00 Anount: 0.00 An | # of Multis (grade): 10.00 Mittage fatter #2: 1.00 I relation of the mount; 0.00 Final OI wat Am; 0.00 MARTYNE, YVONE Cust. Hours: 0.00 Bill Hours: 5.25 Rate: 13.00 Hrly Amount; 76.75 Emp. Expense; 0.00 Amt. B Actual: Hours: 5.25 Miles: 0.00 Rate: 0.60 Mile Amount; 76.75 Emp. Expense; 0.00 Amt. B Actual: Hours: 0.20 Miles: 0.00 Rate: 0.00 Cale. Amount; 0.00 Amt. B Min: Hours: 0.00 Miles: 0.00 Rate: 0.00 OT Amount; 102.75 Mile Mile 102.75 Wait: Hours: 0.00 Rate: 0.00 Rate: 13.00 Hr/Hy Amount; 10.27 102.75 Wait: Hours: 0.00 Rate: 0.00 Rate: 13.00 Hr/Hy Amount; 0.00 Amt. B 102.75 102.75 102.75 10 | 1: 1.00 Hourly Rate #2: 15.00 Total Wait Hours: 0.00 Wait Hrly Rate: 0.00 Total Wait Amt: |
| $ \begin{array}{ c c c c c c c c c c c c c c c c c c c$ | $ \begin{array}{c c c c c c c c c c c c c c c c c c c $ | 1: 10.00 Mileage Rate #2: 1.00 Total OT Wait Hours: 0.00 Wait OT Hrly Rate: 0.00 Total OT Wait Amt: |
| | Actual:Hours:5.25Miles:30.00Miles:6.00Bill Miles:30.00Rate:0.60Mile Amount:18.00Min Amount:0.00For Amount:< | VONE Cust. Hours: 0.00 Bill Hours: 5.25 Rate: 13.00 Hrly Amount: 76.75 Emp. Expense: |
| Min: Hours: 0.00 Minut: 0.00 Calc. Amount: 0.00 CTHours: 0.00 Calc. Amount: 102.75 Wait: Hours: 0.00 Rate: 0.00 CTAmount: 0.00 CTHours: 102.75 Wait: Hours: 0.00 Rate: 0.00 CTAmount: 0.00 THours: 100 TAMOUNT: 102.75 HERZOG, DONNA Cust. Hours: 0.00 Bill Hours: 5.00 Rate: 13.00 Hirly Amount: 73.00 Emp. Expense: 0.00 Amt. Billed Actual: Hours: 5.00 Miles: 41.00 Rate: 0.00 CTAmount: 0.00 Amt. Billed Actual: Hours: 0.00 Miles: 41.00 Rate: 0.00 CTAmount: 0.00 Amt. Billed Actual: Hours: 0.00 Miles: 41.00 Rate: 0.00 CTAmount: 0.00 Amt. Billed Min: Hours: 0.00 Miles: | Min: Hours: 0.00 Miles: 0.00 Amount: 0.00 OT Hours: 0.00 Cale. Amount: 102.75 Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Thours: 10.0 Cale. Amount: 102.75 Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Thours: 10.0 102.75 HERZOG, DONNA Cust. Hours: 5.00 Rate: 13.00 Hrly Amount: 73.00 Emp. Expense: 0.00 Amut.B Actual: Hours: 0.00 Mate: 41.00 Rate: 13.00 Hrly Amount: 73.00 Emp. Expense: 0.00 Amt.B Min: Hours: 0.00 Mate: 41.00 Rate: 0.00 OT Amount: 0.00 Amt.B Min: Hours: 0.00 Mate: 0.00 OT Amount: 24.60 Min Amount: 0.00 For Dr Min: Hours: 0.00 Rate: | : 5.25 Miles: 30.00 Miles: 6.00 Bill Miles: 30.00 Rate: 0.60 Mile Amount: 18.00 Min Amount: |
| Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 OT Hours: 0.00 IO2.75 HERZOG, DONNA Cust. Hours: 0.00 Bill Hours: 5.00 Rate: 13.00 Hrly Amount: 73.00 Emp. Expense: 0.00 Amt. Billed Actual: Hours: 5.00 Miles: 41.00 Rate: 13.00 Hrly Amount: 73.00 Emp. Expense: 0.00 Amt. Billed Actual: Hours: 5.00 Miles: 41.00 Rate: 0.60 Mile Amount: 0.00 Farter or on 0.00 Amt. Billed Min: Hours: 0.00 Miles: 41.00 Rate: 0.00 OT Amount: 0.00 Emp. Expense: 0.00 Farter or on 0.00 Mit. Stater or on 0.00 Mit. Amount: 0.00 Mit. Billed Mit. Billed 0.00 Mit. Billed 0.00 Mit. Amount: 0.00 Mit. Billed 0.00 Mit. Billed 0.00 Mit. Billed 0.00 Mit. Billed 0.00 Mit. B | Wait: Hours: 0.00 Rate: 0.00 Rate: 0.00 OT Amount: 0.00 Thours: 102. HERZOG, DONNA Cust. Hours: 0.00 Bill Hours: 5.00 Rate: 13.00 Hrly Amount: 73.00 Emp. Expense: 0.00 Amt. B Actual: Hours: 5.00 Miles: 41.00 Rate: 13.00 Hrly Amount: 73.00 Emp. Expense: 0.00 Amt. B Actual: Hours: 0.00 Miles: 41.00 Rate: 0.00 OT Amount: 24.60 Min Amount: 0.00 for Dr Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 OT Mount: 0.00 for Dr Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 OT Mount: 0.00 Amount: 0.00 Amount: 0.00 Min. B Win: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 OT Mount: 0.00 Amount: 0.00 Mount: 0.00 | :: 0.00 Miles: 0.00 Amount: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Cale. Amount: |
| HERZOG, DONNA Cust. Hours: 0.00 Bill Hours: 5.00 Rate: 13.00 Hrly Amount: 73.00 Emp. Expense: 0.00 Amt. Billed Actual: Hours: 5.00 Miles: 41.00 Miles: 41.00 Miles: 41.00 Miles: 41.00 Miles: 41.00 Miles: 0.00 Thurst 0.00 Emp. Expense: 0.00 For briver Min: Hours: 0.00 Miles: 41.00 Rate: 0.00 OT Amount: 0.00 For Driver Min: Hours: 0.00 Miles: 0.00 OT Hours: 0.00 Cale: Amount: 110.00 Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Cale: Amount: 110.00 | HERZOG, DONNA Cust. Hours: 0.00 Bill Hours: 5.00 Rate: 13.00 Hrly Amount: 73.00 Emp. Expense: 0.00 Amt. B Actual: Hours: 5.00 Miles: 41.00 Rate: 0.60 Mile Amount: 24.60 Min Amount: 0.00 for Dr Min: Hours: 0.00 Miles: 0.00 Rate: 0.00 OT Amount: 0.00 for Dr Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Tono for Dr Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Cale. Amount: 110.00 | :: 0.00 Rate: 0.00 Amount: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00 |
| Actual: Hours: 5.00 Miles: 61.00 Miles: 41.00 Miles: 61.00 Bill Miles: 41.00 Rate: 0.60 Mile Amount: 24.60 Min Amount: 0.00 for Driver Min: Hours: 0.00 Miles: 0.00 OT Hours: 0.00 Cale: Amount: 0.00 For Driver Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Cale: Amount: 110.00 Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 THours: 0.00 Cale: Amount: 110.00 | Actual: Hours: 5.00 Miles: 41.00 Miles: 6.00 Bill Miles: 41.00 Rate: 0.60 Mile Amount: 24.60 Min Amount: 0.00 for Dr Min: Hours: 0.00 Miles: 0.00 OT Hours: 0.00 OT Amount: 0.00 for Dr Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Cale. Amount: 110.00 Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 110.00 | NA Cust. Hours: 0.00 Bill Hours: 5.00 Rate: 13.00 Hrly Amount: 73.00 Emp. Expense: |
| Min: Hours: 0.00 Minuth 0.00 OT Hours: 0.00 OT Amount: 0.00 OT Hours: 0.00 Cale: Amount: 110.00 Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 III0.00 | Min: Hours: 0.00 Miles: 0.00 Amount: 0.00 CT Hours: 0.00 Cale: Amount: 110.00 Wait: Hours: 0.00 Rate: 0.00 OT Amount: 0.00 T II0.00 | : 5.00 Miles: 41.00 Miles: 6.00 Bill Miles: 41.00 Rate: 0.60 Mile Amount: 24.60 Min Amount: |
| Wait: Hours: 0.00 Rate: 0.00 Amount: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00 I Amount: 0.00 II 0.00 | Wait: Hours: 0.00 Rate: 0.00 Amount: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00 T Amount: 0.00 | :: 0.00 Miles: 0.00 Amount: 0.00 OT Hours: 0.00 Rate: 0.00 OT Amount: 0.00 Cale. Amount: |
| | | |

20



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 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



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).

| 🗃 Print I | nvoices, Estimates, | , Billing Prepa | ration Report | | | | | × | | | | |
|--|---|-----------------|------------------|-----------------|-----------|--------|----------|--------|--|--|--|--|
| Print l | Print Estimate / Invoice / Billing Prep Report Number of trips selected: 5702 | | | | | | | | | | | |
| Dates a | Dates and General Assignment Billing Other Sorting / Printing | | | | | | | | | | | |
| Departure Date Range: From: To: Dates: 🔽 | | | | | | | | | | | | |
| Cust | Customer: Selected Trip#: | | | | | | | | | | | |
| Destin | Destination: Trip# range: To: To: | | | | | | | | | | | |
| | | | | | - | | | | | | | |
| Trip# | Customer | [| Destination | | Departure | Billed | Canceled | Assi 🔺 | | | | |
| 6926 | ECHO MOUNTAIN I | ELEM. | CROW AGRICUL | TURAL FACILITY | 11/6/98 | Yes | No | Yes | | | | |
| 5919 | ECHU MUUNTAIN I | ELEM. | SHADUW MUUN | TAIN HIGH SCHUL | 3/24/98 | Yes | No | Yes | | | | |
| 6196 | ECHU MUUNTAIN I | ELEM. | SUNRISE MIDDL | E SCHUUL | 3/18/98 | Yes | NO | Yes | | | | |
| 6231 | ECHU MUUNTAIN I | ELEM. | RUCKIN R RANC | H | 4/2/98 | Yes | No | Yes | | | | |
| 6232 | ECHU MUUNTAIN I | ELEM. | RUCKIN R RANC | H D TOO | 4/6/98 | Yes | No | Yes | | | | |
| 6265 | ECHU MUUNTAIN I | ELEM. | WILDLIFE WURL | D 200 | 4/21/98 | Yes | NO | Yes | | | | |
| 6294 | ECHU MUUNTAIN I | ELEM. | CASTLES AND U | UASTERS | 5/7/98 | Yes | No | Yes | | | | |
| 6334 | ECHU MUUNTAIN I | ELEM. | VISTA VERDE MI | DDLE SCHOOL | 5/4/98 | Yes | No | Yes | | | | |
| 6923 | ECHU MUUNTAIN I | ELEM. | FLEISCHER MUS | EUM | 10/14/98 | Yes | NO | Yes | | | | |
| 7358 | ECHU MUUNTAIN I | ELEM. | DESERT DISCOV | ERY CENTER | 1/13/99 | Yes | No | Yes 🗸 | | | | |
| | | | | | | | | • | | | | |
| Find Al | 1 Print Invoices | Print Estimat | tes Print Billin | g Prep Report | | | E | xit | | | | |
| L | | | | | | | | | | | | |

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).

| B Print Invoices, Estimates, Billing Preparation Report | | | | | | | | | | | | | | |
|---|---|----------------|--|----------------------|---------|----------|-------|--|--|--|--|--|--|--|
| Print I | Print Estimate / Invoice / Billing Prep Report Number of trips selected: 5702 | | | | | | | | | | | | | |
| Dates and General Assignment Billing Other Sorting / Printing | | | | | | | | | | | | | | |
| Selected Schedule: | | | | | | | | | | | | | | |
| Ass | igned 🔽 Unassi | ened 🔽 Billed | ✓ Unbilled | | | | | | | | | | | |
| 1400 | | gaeu — Dineu | Chollet | | | | | | | | | | | |
| | II Contener | | | Deserture | Dillard | Concolod | | | | | | | | |
| | CUSTOMER | | | Departure 11/0/00 | Billed | Lancelea | | | | | | | | |
| 5010 | ECHO MOUNTAIN | ELEM. UT | NUW AGRICULTURAL FACILITY JADOW MOUNTAIN LIGH SCHOT | 2/24/00 | Yes | No | | | | | | | | |
| 6196 | ECHO MOUNTAIN | ELEM. SI | INRISE MIDDLE SCHOOL | 3/24/30 | Yes | No | Yes | | | | | | | |
| 6231 | | ELEM. SC | | 4/2/98 | Yes | No | Yes | | | | | | | |
| 6232 | ECHO MOUNTAIN | ELEM BI | | 4/6/98 | Yes | No | Yes | | | | | | | |
| 6265 | ECHO MOUNTAIN | ELEM. | ILDLIFE WORLD ZOO | 4/21/98 | Yes | No | Yes | | | | | | | |
| 6294 | ECHO MOUNTAIN | ELEM. C4 | ASTLES AND COASTERS | 5/7/98 | Yes | No | Yes | | | | | | | |
| 6334 | ECHO MOUNTAIN | ELEM. VI | STA VERDE MIDDLE SCHOOL | 5/4/98 | Yes | No | Yes | | | | | | | |
| 6923 | ECHO MOUNTAIN | ELEM. FL | EISCHER MUSEUM | 10/14/98 | Yes | No | Yes | | | | | | | |
| 7358 | ECHO MOUNTAIN | ELEM. DI | ESERT DISCOVERY CENTER | 1/13/99 | Yes | No | Yes 🖵 | | | | | | | |
| | Foro nonnerne | eren line | | ** 10.4.100 | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Find AT | Print Impigon | Print Fatimate | Drint Billing Drop Barart | | | F | Г | | | | | | | |
| rina Al | r rint invoices | FIDITESUMATE: | S Print Billing Prep Keport | | | E | | | | | | | | |

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).

| 🕮 Print Ir | Print Invoices, Estimates, Billing Preparation Report | | | | | | | | | | | | |
|----------------|---|--------------|------|---------------------------|------------|--------|----------|--------|--|--|--|--|--|
| Print I | Print Estimate / Invoice / Billing Prep Report Number of trips selected: 5702 | | | | | | | | | | | | |
| Dates ar | Dates and General Assignment Billing Other Sorting / Printing | | | | | | | | | | | | |
| Fund: | | | | | | | | | | | | | |
| Billi Custo | Billing Customer | | | | | | | | | | | | |
| Trip# | Customer | | Des | tination | Departure | Billed | Canceled | Assi 🔺 | | | | | |
| 6926 | ECHO MOUNTAIN | ELEM. | CRO | OW AGRICULTURAL FACILITY | 11/6/98 | Yes | No | Yes | | | | | |
| 5919 | ECHO MOUNTAIN | ELEM. | SH/ | ADOW MOUNTAIN HIGH SCHO | 3/24/98 | Yes | No | Yes — | | | | | |
| 6196 | ECHO MOUNTAIN | ELEM. | SUN | NRISE MIDDLE SCHOOL | 3/18/98 | Yes | No | Yes | | | | | |
| 6231 | ECHO MOUNTAIN | ELEM. | RO | CKIN R RANCH | 4/2/98 | Yes | No | Yes | | | | | |
| 6232 | ECHO MOUNTAIN | ELEM. | RO | CKIN R RANCH | 4/6/98 | Yes | No | Yes | | | | | |
| 6265 | ECHO MOUNTAIN | ELEM. | WIL | DLIFE WORLD ZOO | 4/21/98 | Yes | No | Yes | | | | | |
| 6294 | ECHO MOUNTAIN | ELEM. | CAS | TLES AND COASTERS | 5/7/98 | Yes | No | Yes | | | | | |
| 6334 | ECHO MOUNTAIN | ELEM. | VIS | TA VERDE MIDDLE SCHOOL | 5/4/98 | Yes | No | Yes | | | | | |
| 6923 | ECHO MOUNTAIN | ELEM. | FLE | ISCHER MUSEUM | 10/14/98 | Yes | No | Yes | | | | | |
| 7358 | ECHO MOUNTAIN | ELEM. | DES | SERT DISCOVERY CENTER | 1/13/99 | Yes | No | Yes 🖵 | | | | | |
| ATT I | Leono normetros | | | | 44 104 100 | 1 | 1 | | | | | | |
| | | | | | | | | | | | | | |
| Find All | l Print Invoices | Print Estima | ntes | Print Billing Prep Report | | | E | xit | | | | | |
| | | | | | | | | | | | | | |

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).

| 🗃 Print Iı | Print Invoices, Estimates, Billing Preparation Report | | | | | | | | | | | |
|--|---|---------------|------------------------------|------------|--------|----------|--------|--|--|--|--|--|
| Print I | Print Estimate / Invoice / Billing Prep Report Number of trips selected: 5702 | | | | | | | | | | | |
| Dates a | Dates and General Assignment Billing Other Sorting / Printing | | | | | | | | | | | |
| Selected Request #: Selected Category: | | | | | | | | | | | | |
| | Selected Grade: Selected Division: | | | | | | | | | | | |
| Selec | ted Internal Numbe | r: | | | | | | | | | | |
| | | | | | | | | | | | | |
| Trip# | Customer | [| Destination | Departure | Billed | Canceled | Assi 🔺 | | | | | |
| 6926 | ECHO MOUNTAIN | ELEM. | CROW AGRICULTURAL FACILITY | 11/6/98 | Yes | No | Yes | | | | | |
| 5919 | ECHO MOUNTAIN I | ELEM. | SHADOW MOUNTAIN HIGH SCHO(| 3/24/98 | Yes | No | Yes - | | | | | |
| 6196 | ECHO MOUNTAIN I | ELEM. | SUNRISE MIDDLE SCHOOL | 3/18/98 | Yes | No | Yes | | | | | |
| 6231 | ECHO MOUNTAIN I | ELEM. | ROCKIN R RANCH | 4/2/98 | Yes | No | Yes | | | | | |
| 6232 | ECHO MOUNTAIN I | ELEM. | ROCKIN R RANCH | 4/6/98 | Yes | No | Yes | | | | | |
| 6265 | ECHO MOUNTAIN I | ELEM. | WILDLIFE WORLD ZOO | 4/21/98 | Yes | No | Yes | | | | | |
| 6294 | ECHO MOUNTAIN I | 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 I | ELEM. | DESERT DISCOVERY CENTER | 1/13/99 | Yes | No | Yes 🖵 | | | | | |
| | ll coue u euror une | er er r | | 44 104 100 | | 1 | | | | | | |
| | | | | | | | | | | | | |
| Find Al | l Print Invoices | Print Estimat | es Print Billing Prep Report | | | E | xit | | | | | |
| | | | | | | | | | | | | |

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).

| 🗃 Print Ir | nvoices, Estimates | , Billing Pre | parati | on Repor | t | | | | | × | | | |
|------------------|---|---------------|--------|------------------|----------------|--------|------------|--------|----------|--------|--|--|--|
| Print I | Print Estimate / Invoice / Billing Prep Report Number of trips selected: 5702 | | | | | | | | | | | | |
| Dates a | Dates and General Assignment Billing Other Sorting / Printing | | | | | | | | | | | | |
| Sort b Sort b | Sort by #1: Wehicle Type Order By #1: Ascending Use standard T.O.M. Invoice Sort by #2: Vehicle Type Image: Order By #2: Descending Format: | | | | | | | | woice | N | | | |
| Sort h | Sort by #3: Vehicle Type Order By #3: Descending RPT_INVOICE | | | | | | | | | | | | |
| Trip# | Customer | | Des | tination | | | Departure | Billed | Canceleo | Assi 🔺 | | | |
| 6926 | ECHO MOUNTAIN | ELEM. | CRC | W AGRIC | ULTURAL FAC | CILITY | 11/6/98 | Yes | No | Yes | | | |
| 5919 | ECHO MOUNTAIN | ELEM. | SHA | DOW MO | UNTAIN HIGH | SCHO(| 3/24/98 | Yes | No | Yes | | | |
| 6196 | ECHO MOUNTAIN | ELEM. | SUN | IRISE MID | DLE SCHOOL | | 3/18/98 | Yes | No | Yes | | | |
| 6231 | ECHO MOUNTAIN | ELEM. | RO | CKIN R RA | NCH | | 4/2/98 | Yes | No | Yes | | | |
| 6232 | ECHO MOUNTAIN | ELEM. | RO | CKIN R RA | NCH | | 4/6/98 | Yes | No | Yes | | | |
| 6265 | ECHO MOUNTAIN | ELEM. | WIL | DLIFE WO | RLD ZOO | | 4/21/98 | Yes | No | Yes | | | |
| 6294 | ECHO MOUNTAIN | ELEM. | CAS | TLES AND | COASTERS | | 5/7/98 | Yes | No | Yes | | | |
| 6334 | ECHO MOUNTAIN | ELEM. | VIS: | TA VERDE | MIDDLE SCH | OOL | 5/4/98 | Yes | No | Yes | | | |
| 6923 | ECHO MOUNTAIN | ELEM. | FLE | ISCHER M | IUSEUM | | 10/14/98 | Yes | No | Yes | | | |
| 7358 | ECHO MOUNTAIN | ELEM. | DES | ERT DISC | COVERY CENT | ER | 1/13/99 | Yes | No | Yes 🚽 | | | |
| Ĩ | | | | | TE 1000 (ED.0) | | 44 104 100 | | | | | | |
| Find Al | l Print Invoices | Print Estin | mates | Print Bil | lling Prep Rep | ort | | |] | Exit | | | |

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.

