The ILLiad Lending Billing Window is Blank

Last updated: Fri, 17 Jun 2022 14:35:02 GMT

Symptom

• You are used to seeing an amount in the Billing box when you bill for lending and no amount is showing up

Applies to

• ILLiad

Resolution

Either you have a billing method that is not set up in the Customization Manager, or you do not have any information in the Article Billing Category or the Loan Billing Category. Here are the steps to fix this.

1. In the ILLiad Client, you go to Home and search in the Search Addresses box without putting any limit on the search.
2. When you get the results, find the Article Billing Category header and then click on the pin that is in the top right of the box. You will see all the different Billing Categories you have. You are looking for either a blank space or an entry that is other than Exempt or Default. We will look at the Blank ones first.
3. Click on the Blank space.

You will see all the entries that are blank. You will have to determine on each one if you need to have it set to Exempt or Default. If they are all going to be Default, then you can use a SQL Query to update the Lender Addresses that are blank to be set to Default.

You could run the query like this:

Update LenderAddresses

Set ArticleBillingCategory='Default'

Where ArticleBillingCategory=''

go

If you are on a shared site and this is for all sites, then your query would be:

Update LenderAddressesALL
Set ArticleBillingCategory='Default'
 Where ArticleBillingCategory="
 GO

If you are on a shared site where the sites are ABC, CBS, and NBC, but only ABC will have this update, then your query would be like this:

Update LenderAddressesALL
 Set ArticleBillingCategory='Default'
 Where ArticleBillingCategory="
 and NVTGC='ABC'
 GO

4. If you have an entry in the list that is not blank, Exempt, or Default, then you would need to go to the Customization Manage and to the Billing Defaults table.

5. You would need to look at the Category column header and click on the pin to the top right and select the Category that you saw in the ILLiad Client. This will give you the listing of all your entries for that Category.

6. You will either need to update the Billing Defaults so that you have the correct Category for all the Billing types or go back to the ILLiad Client and update the Billing Category that you have for the Lender Address to be Default.