

QUICK REFERENCE GUIDE

November 1, 2019

Run the Copy Bill Group Process

You can copy a group of bills at one time using the *Copy Bill Group* process. It is useful when multiple new bills need to be created that contain similar data to previously entered bills. The *Copy Bill Group* process is used to produce bills identical to the template bills defined for any active *Bill Copy Group ID*. It also allows the user to change the new bills being created.

During this process, you will define a group of bills to be copied together. First, you must define a *Copy Group Header* for each group of bills to be copied together. Next, you'll identify the bills to be copied on the *Copy Group Detail* page. Then you'll run the Copy Bill Group Process to perform the process. After the bills are copied, you'll need to process the new bills as you would normally. The only information that does not copy from the original bill to the copied bill is the *Invoice ID*, *Bill Status*, and the bill dates.

You can copy the same copy group an unlimited number of times within the date range defined. When using a *Copy Group*, you are not required to copy all the templates in the group. Instead, you can select which templates are to be copied.

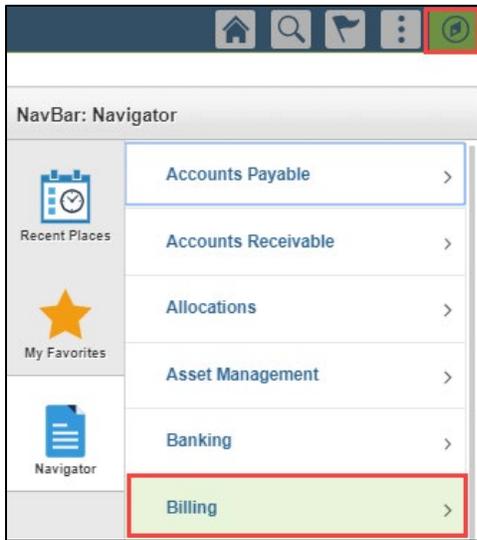
Steps to Complete:

- Step 1: Define a Copy Group Header
- Step 2: Define Copy Group Details
- Step 3: Run the Copy Bill Group Process
- Step 4: Change the Copied Bills Status to Ready
- Step 5: Run the Single Action Invoice Process
- Step 6: Revise Define Copy Group Details Before Running Again

Step 1: Define a Copy Group Header

1. Navigate to the *Define Bill Copy Group* page following instructions below.

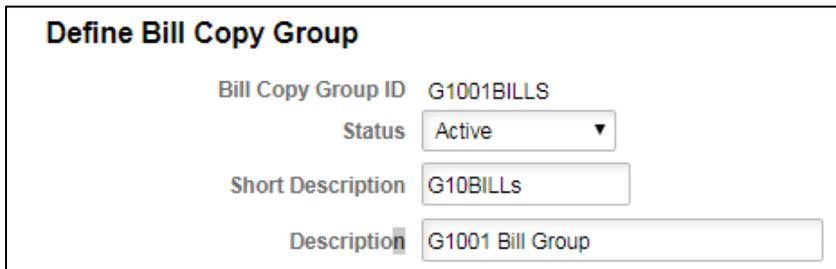
Navigation Options	Navigation Path
NavBar Navigator	Green NavBar icon in Header, Navigator, SWIFT, Billing, Maintain Bills, Define Bill Copy Group.



2. Click the **Add a New Value** tab on the *Define Bill Copy Group Header* page.



3. Enter a name for the group in the *Bill Copy Group ID* field.
Note: It is recommended that your ID begin with your Business Unit. This practice will make it easier to find your ID's in the list.
4. Click on the **Add** button. The *Define Bill Copy Group* page appears.



- Enter the fields on the *Define Bill Copy Group* page as defined below.

Field Name	Field Description
Status	Select the Status from the drop-down options which include "Active" and "Inactive". The Status must be active in order to use the <i>Copy Group Header</i> . (You could also inactivate the Bill Copy Group on this page.)
Short Description	Enter a short description for the <i>Bill Copy Group</i> (10 characters).
Description	Enter a long description for the <i>Bill Copy Group</i> (30 characters).

- Click the **Save** button.

Step 2: Define Copy Group Details

Next, navigate to the *Define Copy Group Detail 1* page. You'll use this page to record the *Template Invoice IDs*, the *Copy Begin* and *End* dates, and the *New Bill Status* for the bills to be created.

- Navigate to the *Define Copy Group Details* page using the instructions below.

Navigation Options	Navigation Path
NavBar Navigator	Green NavBar icon in Header, Navigator, SWIFT 92, Billing, Maintain Bills, Define Copy Group Details.

- Enter the *Bill Copy Group ID* and/or *Short Description* of the *Bill Copy Group*.

Define Copy Group Detail

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

Bill Copy Group ID begins with ▼ G1001BILLS

Short Description begins with ▼ |

Case Sensitive

Search
Clear
[Basic Search](#)
[Save Search Criteria](#)

- Click the **Search** button. The *Define Copy Group Detail 1* page displays.
- Complete the fields in the **Copy Bill Selection** section as described below.

Field Name	Field Description
*Business Unit	Verify the <i>Business Unit</i> default or click the Lookup button to search for and select a <i>Business Unit</i> .
*Template Invoice ID	Click the <i>Template Invoice ID</i> Lookup button and search for and select the invoice(s) to be copied.
Customer	The customer will display automatically after the <i>Template Invoice ID</i> has been selected.
*Copy Begin Dt	Enter the <i>Copy Begin Dt</i> . This is the date when a bill is available to be copied.
*Copy End Dt	Enter the <i>Copy End Dt</i> . This is the date when a bill is no longer available to be copied.
New Bill Status	Click the <i>Bill Status</i> Lookup button and select a <i>Bill Status</i> . Tip: If you select a status of “HOLD” it may make searching for the invoice easier since this status isn’t used as often as “NEW” or “RDY”. You can use the Reset Status button in the header to reset all displayed invoice statuses to “NEW”.
Select	Each time you run the process, you will check the Select box to indicate you want to select this bill to copy. You can optionally use the Select All and Deselect All icons in the header.

5. Click the **Add a New Row** button to add additional invoices to be included in the group, entering the fields for each invoice as described above.
6. Ensure that the **Select Checkbox** for each invoice to be copied is checked.

7. Click the **Save** button after all invoices have been added to the group.

8. Click the **Define Copy Group Detail 2** tab. The options and fields available are described below.

Field Name	Field Description
Copy Invoice ID	This field defines the <i>Invoice ID</i> of the new bill. The default field value is "NEXT". The system will generate a new <i>Invoice ID</i> after the process is complete. Return to this page to locate the <i>Invoice IDs</i> . If you are authorized, you can override this default with any number if that number is not a duplicate of an existing invoice.

Field Name	Field Description
Replace Template	You can select the <i>Replace Template</i> option to replace the template for subsequent batch copy processes with the invoice resulting from this copy process. The copy is identical to the template; you can use either the original bill or the new copy as the template.
Copy Step (display only)	The <i>Copy Step</i> field displays the status of the last copy bill group run. After the process is complete, the field will display “DONE” if no errors were encountered; it will display “ERR” if errors occurred.
Reset Copy Invoice ID Button	The <i>Reset Copy Invoice ID</i> option resets all the copy <i>Invoice IDs</i> to “NEXT”. Before running the process again, reset the copy Invoice IDs. WARNING! This is an Important step. If you don’t do this, SWIFT will attempt to reassign the old <i>Invoice IDs</i> to the new bills, and an error occurs.
Clear Replace Button	Click on the <i>Clear Replace</i> function to deselect the <i>Replace Template</i> check boxes for the entire group.

Step 3: Run the Copy Bill Group Process

The next step is to run the *Copy Bill Group* process to produce bills identical to the template bills defined for a *Bill Copy Group ID*.

1. Navigate to the *Copy Bill Group* page using the instructions below.

Navigation Options	Navigation Path
NavBar Navigator	Green NavBar icon in Header, Navigator, SWIFT, Billing, Maintain Bills, Copy Bill Group.

2. Select an existing *Run Control ID* or add a new *Run Control ID* for the *Run Bill Copy* page process.

3. Complete the *Copy Bill Group* page as described below.

Copy Bill Group

Run Control ID NEWG10 Report Manager Process Monitor

Language English ▼

*Bill Copy Group ID

Change Field Values For

Bill Header From Date	<input type="text" value="08/01/2018"/> <input type="button" value="Calendar"/>	To Date	<input type="text" value="08/31/2018"/> <input type="button" value="Calendar"/>
Bill Line From Date	<input type="text" value="08/01/2018"/> <input type="button" value="Calendar"/>	To Date	<input type="text" value="08/31/2018"/> <input type="button" value="Calendar"/>

Set Field Values

Invoice Date	<input type="text"/> <input type="button" value="Calendar"/>
Accounting Date	<input type="text"/> <input type="button" value="Calendar"/>

Field Name	Field Description
Bill Copy Group ID	Enter the <i>Bill Copy Group Header Group ID</i> that you defined in the first step of the process or use the Lookup button to search for and select the name.
Bill Header From Date and To Date	Define the Bill Header <i>From</i> and <i>To</i> dates that will display on the invoices being generated. You have the following options: <ul style="list-style-type: none"> - If you leave the fields blank, the <i>From</i> and <i>To Dates</i> that were entered when creating the bill will be used. If no dates were entered when creating the bill, the fields will be blank. - Enter the beginning and ending date of the period of service that the customer will be billed for. These dates will appear on the invoices being generated.
Bill Line From and To Date	The Bill Line <i>From</i> and <i>To</i> dates can be used but they do not display on the invoices being generated. You have the following options: <ul style="list-style-type: none"> - If you leave the fields blank, the <i>From</i> and <i>To Dates</i> that were entered when creating the bill will be used. If no dates were entered when creating the bill, the fields will be blank. - Enter the beginning and ending date of the period of service that the customer will be billed for.
Invoice Date	Enter the <i>Invoice Date</i> or leave it blank and it will be populated with the current date when running the Single Action Invoice process.

Field Name	Field Description
Accounting Date	Enter the <i>Accounting Date</i> or leave it blank and it will be populated with the current date when running the Single Action Invoice process.

- Click the **Save** button.
- Click the **Run** button.

Process Scheduler Request

User ID 01159534 Run Control ID NEWG10

Server Name Run Date

Recurrence Run Time

Time Zone

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Copy Group of Bills	BICPYGRP	Application Engine	Web	TXT	Distribution

- Accept the **Copy Group of Bills (BICPYGRP)** default process and click the **OK** button. You are returned to the *Copy Bill Group* page.
- Note the *Process Instance* number and click the *Process Monitor* link to ensure the process was successful. (The Run Status will display "Success" and the Distribution Status displays "Posted".)

Process List | **Server List**

View Process Request For

User ID Type Last Hours

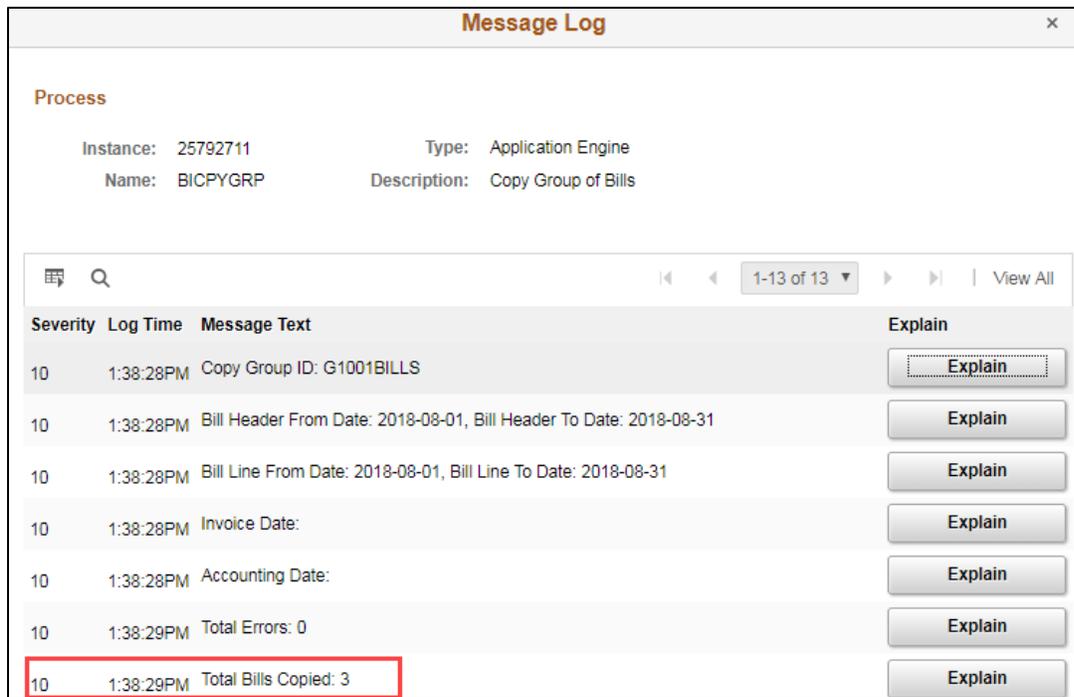
Server Name Instance From Instance To

Run Status Distribution Status Save On Refresh

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	25792711		Application Engine	BICPYGRP	01159534	08/29/2018 1:37:09PM CDT	Success	Posted	Details

- Click on the *Details* link and view the Message Log, the number of new bills created should be listed.



Step 4: Change the Copied Bill(s) Status to Ready

You'll need to navigate to the copied bills to change the bill *Statuses* to "RDY" (Ready). To do this, first look up the new invoice number(s) by reviewing the *Define Copy Group Detail 2* page.

1. Navigate to the Define Copy Group Details page using the instructions below.

Navigation Options	Navigation Path
NavBar Navigator	Green NavBar icon in Header, Navigator, SWIFT, Billing, Maintain Bills, Define Copy Group Details.

2. **At the Define Copy Group Detail page**, enter the *Bill Copy Group ID* and click the **Search** button.
3. Click on the *Bill Copy Group ID* link in the *Search Results* section.
4. Click on the **Define Copy Group Detail 2** tab. Notice that the Copy Step box indicates that the process is done (DON).
5. Make note of the *Copy Invoice ID's*.

The screenshot shows the 'Define Copy Group Detail 2' interface. At the top, there are tabs for 'Define Copy Group Detail 1' and 'Define Copy Group Detail 2'. Below the tabs, the 'Bill Copy Group ID' is set to 'G1001BILLS' and the 'G1001 Bill Group' is selected. There are buttons for 'Reset Copy Invoice ID' and 'Clear Replace'. The main area is titled 'Copy Bill Selection' and contains a table with the following columns: 'Select', 'Template Invoice ID', 'Copy Invoice ID', 'Replace Template', and 'Copy Step'. The table lists three copied bills, with the 'Copy Invoice ID' and 'Copy Step' columns highlighted in red. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

Select	Template Invoice ID	Copy Invoice ID	Replace Template	Copy Step
<input checked="" type="checkbox"/>	00000491266 Customer 0000000006 League of Minnesota Cities	00000491337	<input type="checkbox"/>	DON
<input checked="" type="checkbox"/>	00000491336 Customer 0000000002 City of Plymouth	00000491339	<input type="checkbox"/>	DON
<input checked="" type="checkbox"/>	00000491335 Customer 0000000009 MN Sports Facilities Authority	00000491338	<input type="checkbox"/>	DON

6. Navigate to the *Bill Entry* page to look up the copied bills: Bill, Maintain Bills, Standard Bills.
7. On the *Bill Entry* page, click on the **Find an Existing Value** tab and enter your search criteria.
Note: If you set the copied invoices status to “Hold”, you may be able to find them by searching for bills with that status.
8. Select the *Invoice* link in the search results. The *Header – Info 1* page appears for the invoice.
9. After reviewing the invoice information and making any changes, click the **Status Lookup** icon and select “RDY” (Ready). If you copied older invoices that have the “Crystal” format, you should change the format to “XMLPUB” at this time.
10. Click the **Save** button.

Step 5: Run the Single Action Invoice Process

Finally, you’ll need to run the Single Action Invoice process as you would normally to print the invoices and create the Pending AR item. Refer to the [“Single Action Invoice Process”](#) guide for instructions.

Step 6: Revise Define Copy Group Details Before Running Again

Before running the Copy Bill Group process again for this group, make sure to go to the **Define Copy Group Detail 2** tab and click the **Reset Copy Invoice ID** button. You need to do this because duplicate

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Invoice ID's are not permitted. If you don't do this, the process will appear to be successful but the **Message Log** will show that an error was encountered and "0" bills were copied.

Message Log

Process

Instance: 11596534 Type: Application Engine
Name: BICPYGRP Description: Copy Group of Bills

Severity	Log Time	Message Text	Explain
10	10:27:31AM	Copy Group ID: TRN01	Explain
10	10:27:31AM	Bill Header From Date: , Bill Header To Date:	Explain
10	10:27:31AM	Bill Line From Date: , Bill Line To Date:	Explain
10	10:27:31AM	Invoice Date:	Explain
10	10:27:31AM	Accounting Date:	Explain
10	10:27:31AM	Total Errors: 2	Explain
10	10:27:31AM	Total Bills Copied: 0	Explain

The **Define Copy Group Detail 2** tab also shows that an error was encountered in the *Copy Step* field.

Define Copy Group Detail 1 Define Copy Group Detail 2

Bill Copy Group ID: TRN01 TRN01 GRP COPY

Reset Copy Invoice ID Clear Replace

Select	Template Invoice ID	Copy Invoice ID	Replace Template	Copy Step	
<input checked="" type="checkbox"/>	WC-IA000013	NEXT	<input type="checkbox"/>	ERR	
	Customer: G020100001	ADMINISTRATION DEPT		4000	Copy Invoice ID is not unique
<input checked="" type="checkbox"/>	WC-IA000012	NEXT	<input type="checkbox"/>	ERR	
	Customer: G020100001	ADMINISTRATION DEPT		4000	Copy Invoice ID is not unique