

Run the Copy Bill Group Process

You can copy a group of bills at one time using the Copy Bill Group process. The Copy Bill Group process is useful when needing to produce bills identical to previously entered bills.

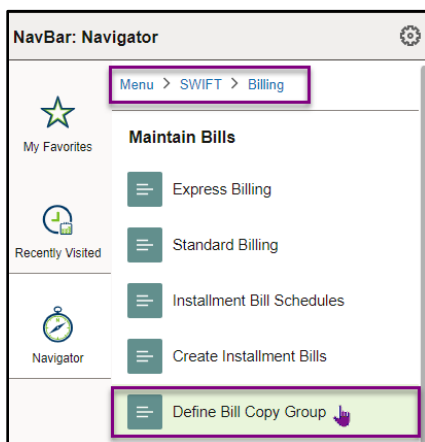
First, you must create a Bill Copy Group ID for each group of bills to be copied together. Next, identify the bills to be copied on the Copy Group Detail page. The identified bills become the templates. Then run the Copy Bill Group Process to create copied bills. Copied bills need to be processed as 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 bill dates. Copied bills can be changed.

You can copy the same copy group of bills an unlimited number of times within the date range defined. When using a Copy Group, you choose which templates are to be copied.

Step 1: Define the Bill Copy Group ID

1. Navigate to the Define Bill Copy Group page as directed below.

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



2. Select the **Add a New Value** button on the Define Bill Copy Group Header page.
3. Enter a name for the group in the Bill Copy Group ID field. A suggested practice is to begin the ID with your business unit to make it easier to find your IDs in the list.

4. Select the **Add** button.

5. The Define Bill Copy Group page appears.
6. Enter the fields on the Define Bill Copy Group page as described below.

Field Name	Field Description
Status	Select a Status from the drop-down menu. Select “Active” to use this Bill Copy Group ID. You can also select “Inactive” if/when no longer needed.
Short Description	Enter a short description for the Bill Copy Group (10 characters).
Description	Enter a long description for the Bill Copy Group (30 characters).

7. Select the **Save** button.

Step 2: Define Copy Group Details

Navigate to the Define Copy Group Detail 1 page. Use this page to record the Template Invoice IDs, the Copy Begin and End dates, and choose a New Bill Status for the bills to be created.

1. Navigate to the Define Copy Group Details page as directed below.

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

2. Enter the Bill Copy Group ID and/or Short Description of the Bill Copy Group.
3. Select the **Search** button.

Find an Existing Value

▼ **Search Criteria**

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

Recent Choose from recent searches

Searches

Bill Copy Group ID begins with G10TRAIN

Short Description begins with

^ Show fewer options

Case Sensitive

Search Clear

4. Select the Bill Copy Group ID that you want to use.

▼ **Search Results**

1 rows - Bill Copy Group ID "G10TRAIN"

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Bill Copy Group ID	Description	Short Description	
G10TRAIN	G10Training	G10Train	>

5. The Define Copy Group Detail 1 page displays. Complete the fields in the Copy Bill Selection section as described below.

Field	Field Description
*Business Unit	Verify the Business Unit default or select the Lookup icon to select a Business Unit.
*Template Invoice ID	Select the Template Invoice ID Lookup icon and search for and select the invoice(s) to be copied.
Customer	The customer displays automatically after the Template Invoice ID has been selected.
*Copy Begin Dt	Enter the Copy Begin Dt. This is the date when a bill is available to be copied.
*Copy End Dt	Enter the Copy End Dt. This is the date when a bill is no longer available to be copied.
New Bill Status	Use the Lookup icon to select the Bill Status. Tip: If you select a status of "HOLD" it may make searching for the invoice easier because it is a less used status. Use the Reset Status button to reset all displayed invoices to a "NEW" status.
Select	Check the Select box for each template you want to copy. You can optionally use the Select All and Deselect All icons in the header.

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6. Select 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.
7. Check the **Select** checkbox for each invoice to be copied.
8. Select the **Save** button after all invoices have been added to the group.

The screenshot shows the 'Define Copy Group Detail 1' 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 'G10TRAIN' and 'G10Training'. A 'Reset Status' button is visible. The main section is titled 'Copy Bill Selection' and contains three rows of data. Each row has a 'Select' checkbox (all checked), a '*Business Unit' field (G1001), a '*Template Invoice ID' field (PC TECH FY23 MAD, PEIP, and SEGIP OPS), '*Copy Begin Dt' (03/01/2024), '*Copy End Dt' (03/01/2025), and a 'New Bill Status' field (HLD). The customer information is 'G100100001' and 'MINNESOTA MANAGEMENT & BUDGET'. At the bottom, there are 'Save', 'Return to Search', and 'Notify' buttons.

9. Select 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 Invoice ID of the new bill. "NEXT" is the default value. The system generates a new Invoice ID after the copy process is complete. Return to this page to locate the Invoice IDs. If you are authorized, you can override with your own Invoice ID. Invoice IDs must be unique for a Business Unit.
Replace Template	You can select the Replace Template 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 Copy Step field displays the status of the last copy bill group run. After the process is complete, the field displays "DON" (Done) if no errors were encountered; it displays "ERR" if errors occurred.
Reset Copy Invoice ID Button	The Reset Copy Invoice ID option resets all the copy Invoice IDs 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 attempts to reassign the old Invoice IDs to the new bills, and an error occurs.

Field Name	Field Description
Clear Replace Button	Select the Clear Replace function to deselect the Replace Template check boxes for the entire group.

10. Select the **Save** button.

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 the Global Menu, Navigator, SWIFT, Billing, Maintain Bills, Copy Bill Group.

2. Select an existing Run Control ID or add a new Run Control ID.
3. Complete the Copy Bill Group page as described below.

Field Name	Field Description
Bill Copy Group ID	Enter the Bill Copy Group ID that you defined in the first step of the process or use the Lookup icon to search for and select the ID.

Field Name	Field Description
Bill Header From Date and To Date	Define the Bill Header From and To dates that displays on the invoices being generated. You have the following options: - If you leave the fields blank, the From and To dates 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 From and To dates can be entered, but they do not display on the invoices being generated. You have the following options: - If you leave the fields blank, the From and To Dates 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 Invoice Date or leave it blank and it will be populated with the current date when running the Single Action Invoice process.
Accounting Date	Enter the Accounting Date or leave it blank and it will be populated with the current date when running the Single Action Invoice process.

4. Select the **Run** button.

Copy Bill Group

Run Control ID: Default Report Manager Process Monitor **Run**

Language: English

*Bill Copy Group ID: G10TRAIN

Change Field Values For

Bill Header From Date: 03/01/2024 To Date: 03/31/2024
 Bill Line From Date: To Date:

Set Field Values

Invoice Date: Accounting Date:

Save Return to Search Notify Add Update/Display

- The Process Scheduler Request page displays. Accept the default process, **Copy Group of Bills (BICPYGRP)**.
- Select the **OK** button.

Process Scheduler Request

User ID 01106579 Run Control ID Default

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

- You are returned to the Copy Bill Group page. A Process Instance number is assigned. Select the **Process Monitor** link to track progress. When you see "Success" in the Run Status and "Posted" in the Distribution Status, the copy process is complete.
- Select the **Message Log** from the Actions drop-down menu.

Process List Server List

View Process Requests

User ID Type Last Hours

Server Name Instance Range

Run Status Distribution Status Save On Refresh Report Manager

Process List

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	44857340		Default	Application Engine	BICPYGRP		03/05/2024 11:40:01AM CST	Success	Posted	Details	<ul style="list-style-type: none"> Update Process > Details Parameters Message Log Batch Timings View Log/Trace

Process List | Server List

- The Message Log window displays. Verify the number of bills successfully copied.

Message Log

Help

Process

Instance: 44857340 Type: Application Engine

Name: BICPYGRP Description:

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Severity	Log Time	Message Text	Explain
10	11:40:11AM	Copy Group ID: G10TRAIN	<input type="button" value="Explain"/>
10	11:40:11AM	Bill Header From Date: . Bill Header To Date:	<input type="button" value="Explain"/>
10	11:40:11AM	Bill Line From Date: . Bill Line To Date:	<input type="button" value="Explain"/>
10	11:40:11AM	Invoice Date:	<input type="button" value="Explain"/>
10	11:40:11AM	Accounting Date:	<input type="button" value="Explain"/>
10	11:40:13AM	Total Errors: 0	<input type="button" value="Explain"/>
10	11:40:13AM	Total Bills Copied: 3	<input type="button" value="Explain"/>

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

The copied bills need to be set to a “RDY” status before invoices can be generated. You can find the Invoice IDs by viewing the Define Copy Group Detail 2 page.

1. Navigate to the Define Copy Group Details page as directed below.

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

2. At the Define Copy Group Detail page, enter the Bill Copy Group ID and select the **Search** button.
3. Select the **Bill Copy Group ID** link in the Search Results section.
4. Select the **Define Copy Group Detail 2** tab. Notice that the Copy Step field indicates that the process is “DON” (done).
5. Make note of the Copy Invoice ID’s.

The screenshot shows the 'Define Copy Group Detail 2' page. 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 'G10TRAIN' and 'G10Training'. There are buttons for 'Reset Copy Invoice ID' and 'Clear Replace'. The main section is 'Copy Bill Selection' with a search bar and pagination. A table lists three copied bills. The 'Copy Invoice ID' and 'Copy Step' columns are highlighted with purple boxes. The 'Copy Step' for all three bills is 'DON'.

Select	Template Invoice ID	Copy Invoice ID	Replace Template	Copy Step
<input checked="" type="checkbox"/>	PC TECH FY23 MAD Customer G100100001	00000774817 MINNESOTA MANAGEMENT & BUDGET	<input type="checkbox"/>	DON
<input checked="" type="checkbox"/>	PC TECH FY23 PEIP Customer G100100001	00000774818 MINNESOTA MANAGEMENT & BUDGET	<input type="checkbox"/>	DON
<input checked="" type="checkbox"/>	PC TECH FY23 SEGIP OPS Customer G100100001	00000774819 MINNESOTA MANAGEMENT & BUDGET	<input type="checkbox"/>	DON

6. Navigate to the Standard Bill Entry page to look up the copied bills: Billing, Maintain Bills, Standard Bills.
7. On the Bill Entry page, select the **Find an Existing Value** tab and enter your search criteria.
Note: If you set the copied invoices to a “Hold” status, you can 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, change the Status to “RDY” (Ready).
10. Select the **Save** button.

Step 5: Run the Single Action Invoice Process

Finally, you need to run the Single Action Invoice process as you would normally to finalize the invoices and create Pending AR items. 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 page and select the **Reset Copy Invoice ID** button. This is necessary because Invoice IDs must be unique within a Business Unit. If you forget to do this, the Copy Group Process will appear to have been completed successfully, but the Message Log will show the error and that “0” bills were copied.

This screenshot shows a message log with the following entries:

Log Time	Message Text	Explain
2:38:42PM	Copy Group ID: G10TRAIN	<input type="button" value="Explain"/>
2:38:42PM	Bill Header From Date: 2024-03-01, Bill Header To Date: 2024-03-31	<input type="button" value="Explain"/>
2:38:42PM	Bill Line From Date: , Bill Line To Date:	<input type="button" value="Explain"/>
2:38:42PM	Invoice Date:	<input type="button" value="Explain"/>
2:38:42PM	Accounting Date:	<input type="button" value="Explain"/>
2:38:42PM	Total Errors: 3	<input type="button" value="Explain"/>
2:38:42PM	Total Bills Copied: 0	<input type="button" value="Explain"/>

- The Define Copy Group Detail 2 page also shows the error in the Copy Step field. If this happens, select the Reset Copy Invoice ID, and run the Copy Bill Group process again.

This screenshot shows the 'Define Copy Group Detail 2' page with the following details:

- Buttons: and
- Section: Copy Bill Selection
- Table with 5 columns: Select, Template Invoice ID, Copy Invoice ID, Replace Template, Copy Step

Select	Template Invoice ID	Copy Invoice ID	Replace Template	Copy Step
<input checked="" type="checkbox"/>	PC TECH FY23 MAD Customer: G100100001	00000774917	<input type="checkbox"/>	ERR 4000 Copy Invoice ID is not unique
<input checked="" type="checkbox"/>	PC TECH FY23 PEIP Customer: G100100001	00000774918	<input type="checkbox"/>	ERR 4000 Copy Invoice ID is not unique
<input checked="" type="checkbox"/>	PC TECH FY23 SEQIP OPS Customer: G100100001	00000774919	<input type="checkbox"/>	ERR 4000 Copy Invoice ID is not unique

Buttons at the bottom: , , , ,