SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

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

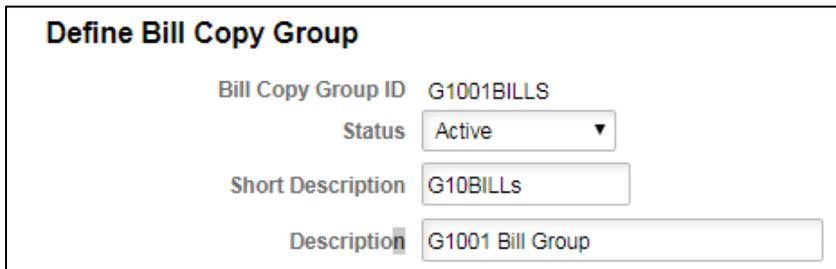1. Navigate to the *Define Bill Copy Group* page following instructions below.

Navigation Options	Navigation Path
NavBar Navigator	Green NavBar icon in Header, Navigator, SWIFT, Billing, Maintain Bills, Define Bill Copy Group.
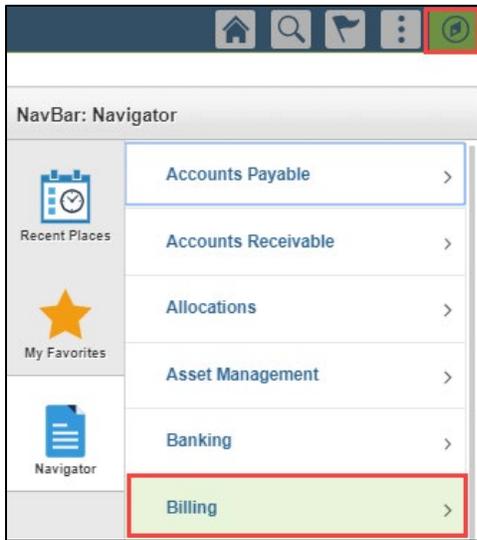
2. Click the **Add a New Value** tab on the *Define Bill Copy Group Header* page.

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.

5. 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 *Copy Group Header*. (You could also inactivate the Bill Copy Group on this page.)
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).

6. 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.

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 92, Billing, Maintain Bills, Define Copy Group Details.

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

3. Click the **Search** button. The *Define Copy Group Detail 1* page displays.

4. Complete the fields in the **Copy Bill Selection** section as described below.

Field Name	Field Description
*Business Unit	Verify the *Business Unit* default or click the **Lookup** button to search for and select a *Business Unit*.
*Template Invoice ID	Click the *Template Invoice ID* **Lookup** button and search for and select the invoice(s) to be copied.
Customer	The customer will display 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	Click the *Bill Status* **Lookup** button and select a *Bill Status*. **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 *Invoice ID* of the new bill. The default field value is "NEXT". The system will generate a new *Invoice ID* after the process is complete. Return to this page to locate the *Invoice IDs*. 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 *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 will display "DONE" if no errors were encountered; it will display "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 will attempt to reassign the old *Invoice IDs* to the new bills, and an error occurs.
Clear Replace Button	Click on the *Clear Replace* function to deselect the *Replace Template* 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.

Field Name	Field Description
Bill Copy Group ID	Enter the *Bill Copy Group Header Group ID* 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 *From* and *To* dates that will 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. These dates will appear on the invoices being generated.
Bill Line From and To Date	The Bill Line *From* and *To* dates can be used 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.

Field Name	Field Description
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. Click the **Save** button.

5. Click the **Run** button.

6. Accept the **Copy Group of Bills** (**BICPYGRP)** default process and click the **OK** button. You are returned to the *Copy Bill Group* page.

7. 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".)

8. Click on the *Details* link and view the Message Log, the number of new bills created should be listed.
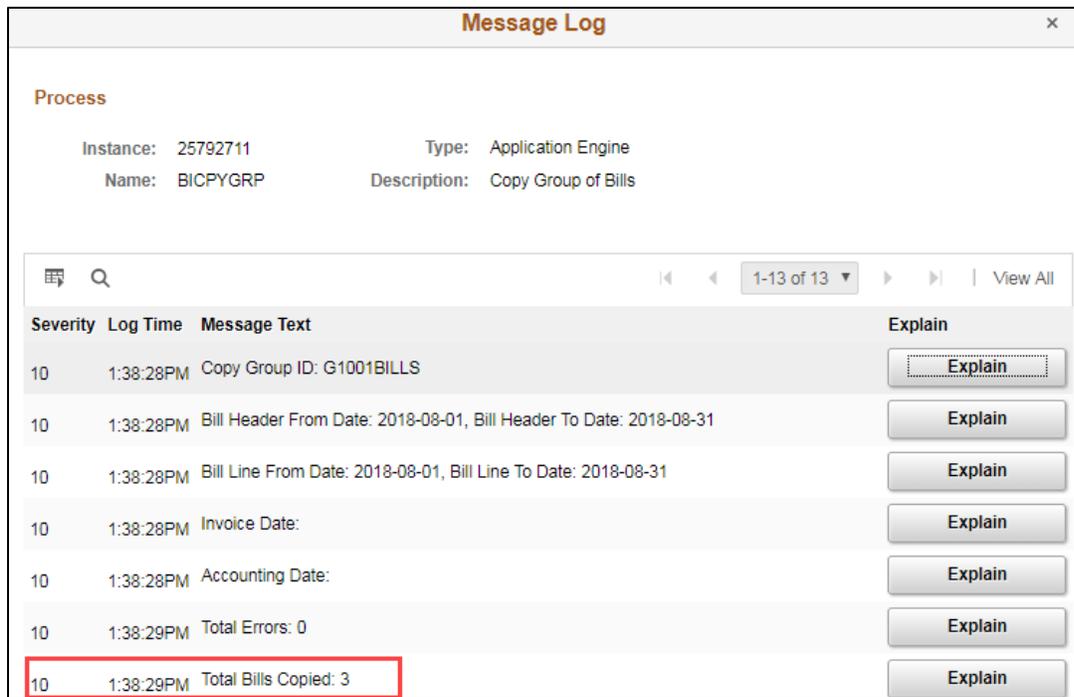
Step 4: Change the Copied Bill(s) Status to Ready

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*.

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 t**he 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

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.

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