

QUICK REFERENCE GUIDE

November 1, 2019

Create a New Bill with Copy Single Bill

You can use the **Copy a Single Bill** component to create a new bill. This method copies the majority of the data from an existing bill into a new bill. It is useful when a new bill needs to be created with all or most of the same information as another bill. You are able to change and update information. This process reduces redundancy in data entry.

You can copy any bill regardless of its status. When you copy a bill, most of the bill information is copied from the original bill to the new bill, including customer, bill lines, notes, and accounting distribution. The only information that does not copy from the original bill is the bill status, invoice ID, and the bill dates. The new bill is created with a *Status* of "New" and is assigned a new *Invoice ID*.

Steps to complete:

- Step 1: Copy a Single Bill
- Step 2: Update the New Bill and Set New Bill Status to Ready
- Step 3: Run the Single Action Invoice Process

Step 1: Copy a Single Bill

1. Navigate to the *Copy a Single Bill* page using one of the options below.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Billing, Maintain and Process Bills, left-menu, Maintain Invoices, Copy Single Bill.
WorkCenter	Accounting, Billing, Billing WorkCenter, left-menu, Links section, Maintain Invoices, Copy Single Bill.

2. At the *Copy Single Bill* page, verify the *Business Unit* and enter the *Invoice Number* for the bill you want to copy.

Note: Additional search criteria is available including Bill Status and Customer.

Copy Single Bill

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

[Find an Existing Value](#)

▼ **Search Criteria**

Business Unit =

Invoice begins with

Bill Status =

Customer begins with

Contract begins with

Case Sensitive

[Basic Search](#)

3. Click the **Search** button.
4. If necessary, click the *Invoice* link for the bill you want to copy in the **Search Results**. The *Copy Single Bill* page displays.
5. Use the information in the header to verify that this is the bill you want to copy, including the invoice number, amount, and customer.

Copy Single Bill

Unit	G1001	Bill To	0000000006	League of Minnesota Cities
Invoice	00000491267	Invoice Amt	250.00	USD

Select Bill Action

No Bill Action

Copy Bill

Number of Copies

Copy Results

1-1 of 1

Sequence	*Copy Bill	Invoice Date
1	<input type="text" value="NEXT"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Calendar"/>

6. Complete the **Copy Bill** section as described below.

Field	Description
Select Bill Action	Select the Copy Bill option.
Number of Copies	Enter the <i>Number of Copies</i> you want to create or accept the default "1".
Create Bill Button	If you are creating more than one copy, click on the Create Bill button and additional rows will be created in the Copy Results section.

7. For each row in the **Copy Results** section, complete the fields described below.

Field	Description
Copy Bill	Leave default of "NEXT" in the <i>Copy Bill</i> field and SWIFT will automatically assign the next number to the new invoice after you save the <i>Copy Single Bill</i> page. You can also enter your own.
Invoice Date	Leave the field blank and the <i>Invoice Date</i> will default to today's date when you save. You can update the <i>Invoice Date</i> here or change it on the bill after it is copied.

8. Click the **Save** button.

Note: The system assigns the new invoice number(s) if you selected the default of "NEXT" and the *Go To Bill Header – Gen Info* link appears. The **Select Bill Action** radio button reverts to "No Bill Action".

Copy Single Bill

Unit G1001 Bill To 0000000006 League of Minnesota Cities
 Invoice 00000491267 Invoice Amt 250.00 USD

Select Bill Action

No Bill Action
 Copy Bill

Number of Copies Create Bills

Copy Results

Sequence	*Copy Bill	Invoice Date	
1	00000491588	02/27/2019	Go To Bill Header - Gen. Info

Save Return to Search Notify

Step 2: Update the New Bill and Set Status to Ready

After a bill has been copied, you can edit any field. Next, update the new copied bill with any changes that you desire and set the *Status* to “Ready”.

1. On the *Copy Single Bill* page, click on the *Go To Bill Header – Gen Info* link. The *Standard Entry* page displays in a new window with the **Header – Info 1** tab selected.

Note: The billing information is identical to the original bill, except the *Invoice ID* is different, *Bill Status* is “NEW”, and the *Invoice Date* has been updated based on your entry on the *Copy Single Bill* page.

2. Make any applicable changes to the new bill as you would normally. (Refer to the “[Enter a Bill - Standard Entry](#)” guide for detailed instructions.) If you are copying an old bill that was created with the “Crystal” format, you should change the format to the “XMLPUB” format at this time.

The screenshot shows the 'Header - Info 1' tab of the 'Standard Entry' page. The 'Status' field is set to 'RDY' and is highlighted with a red box. The 'Save' button at the bottom left is also highlighted with a red box. The page displays various fields for invoice details, including Unit (G1001), Invoice (00000491588), Pretax Amt (250.00 USD), Invoice Date (02/27/2019), Source (ONLINE), Cycle ID (DAILY), *Frequency (Once), *Customer (0000000006), *Invoice Form (XMLPUB), Accounting Date, Remit To (G1001), Sales (DEFAULT), Credit (DEFAULT), Billing Specialist (BISPEC), From Date (07/01/2018), Pay Terms (NET30), To Date (07/31/2018), Bank Account (0001), Bill Inquiry Phone (651-259-3628), Collector (DEFAULT), Billing Authority (BISUP), and Billing Supervisor. Navigation buttons like 'Save', 'Return to Search', 'Notify', 'Refresh', 'Add', and 'Update/Display' are visible at the bottom.

3. Change the *Bill Status* to ready by clicking on the **Lookup** icon and selecting “RDY” (Ready).
4. Click the **Save** button.

Step 3: Run the Single Action Invoice Process

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