BPO_AUTO CALL INVOICE

We are currently updating our site; thank you for your patience.

VERSION RELEASE NOTES

BPO_Auto Call Invoice Version List:

[2.1.0.3]

2.1.0.3 (16.07.2018 2:42 PM)

Functionality:

- **BPO_AutoCallInvoice** attempts to automatically invoice items for completed calls.
- A Daily Scheduled Task is created during installation to run BPO_AutoCallInvoice at 2:00AM every day
- Any completed calls that cannot be invoiced are added to a tsv file that can be opened in Microsoft Excel. This exception list includes call summary information and the reason the call cannot be invoiced so that it can be resolved for invoicing.
- **AutoInvoice Configurator** is used to configure the calls that need to be processed and the email settings for invoice emails and exception logs.
  - Environments – environments to process completed calls
    - EnvironmentName – Name of environment to connect to and process
    - Process – indicates whether to process the environment

- RequireRectificationComments – indicates whether technician comments are required to invoice a completed call.
- **EmailSettings** – email settings for the environment
  - PrintAndEmailInvoices – specify whether invoices should be set as printed and sent to the customer's accounts and billing contact. **Note**: Invoices that are set to printed will be sent to the Accounts Processing Queue. The financial transactions will then be posted by the BPOPostingEngine.
  - SenderMailAddress – email address from which invoices are sent.
  - UseSenderMailAddress – if not set the emails are sent from the BPO site's default email address set in tblCOMPSiteEmailConfig.

  - MailSubject – Subject of the email sent to invoice recipients
  - InvoiceEmailTemplate – email body of the email sent to invoice recipients

- ErrorLogEmailTemplate – email body of the email sent to error log recipients
- ErrorLogRcptType – the user type to receive error logs by email.
- ErrorLogRcpt – only required if ErrorLogRcptType is Employees with Craft or Specific Employee.

- **CallAutoInvoiceFilters** - allows filtering of completed calls to process.
  - FilterField – field by which to filter which calls to include in processing
  - FilterValue – comma separated list of values to specify which calls to include in processing

⊙ Upgrade Notes:

- BPOAutoCallInvoice_v2.1.0.3_Upgrade
- BPO_AutoCallInvoice_Installer_v2.1.0.3

⊙ **Prerequisites:**

- BPO_Posting Engine

  Files available as follows:

  \Implementations\CO3_Releases\Applications\BPO_AutoCallInvoice\v2.1.0.3

BPO.RSI.035