

CONTRACT

EDIT A PREDEFINED BILLING BATCH

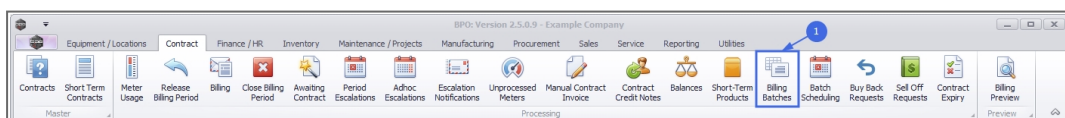
This functionality allows for easily creating predefined billing batches of optimal size and to schedule these batches which will be submitted via BPO Billing Batch Scheduler console application overnight, designed for high volume environments. The posting of the invoices to Evolution will be done via the existing PostingEngine application to prevent timeout errors on the Evolution database.



Refer to **"The Billing Batch Listing Screen" on page 2** for more information relating to the process required for information to be processed by this application.

Items to be billed will be displayed on the left of the screen. You can select the parameters (Billing Day, Contract Type, Fees or Meters, Fee Types) to bill, then drag and drop them into an existing or new batch (on the right hand side of the screen).

Ribbon Access: *Contract > Billing Batches*

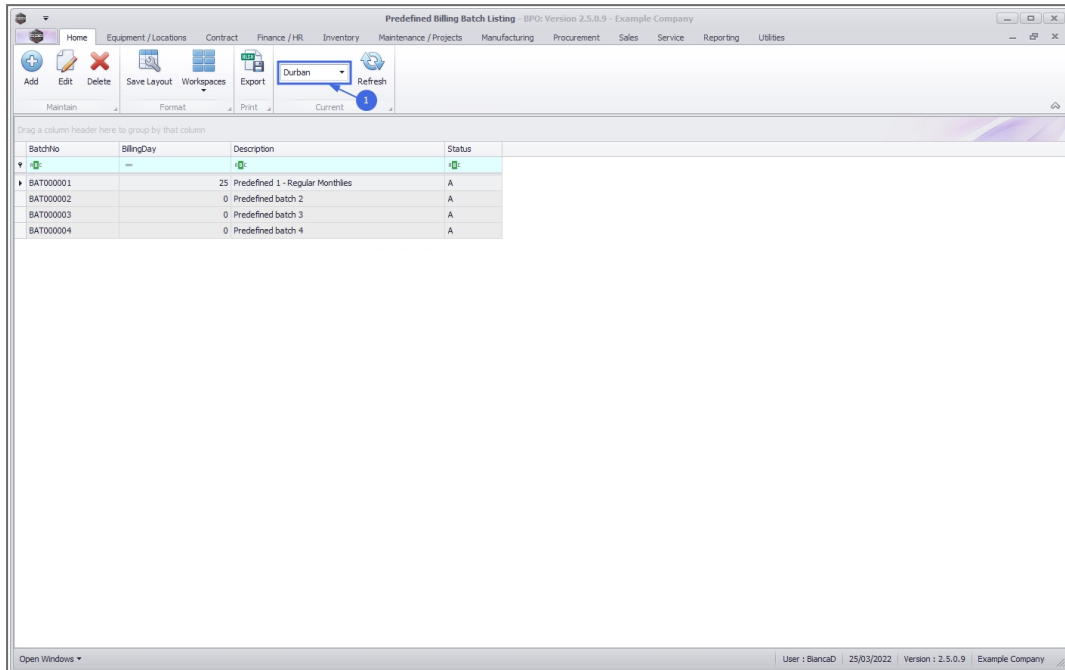


Select the Site

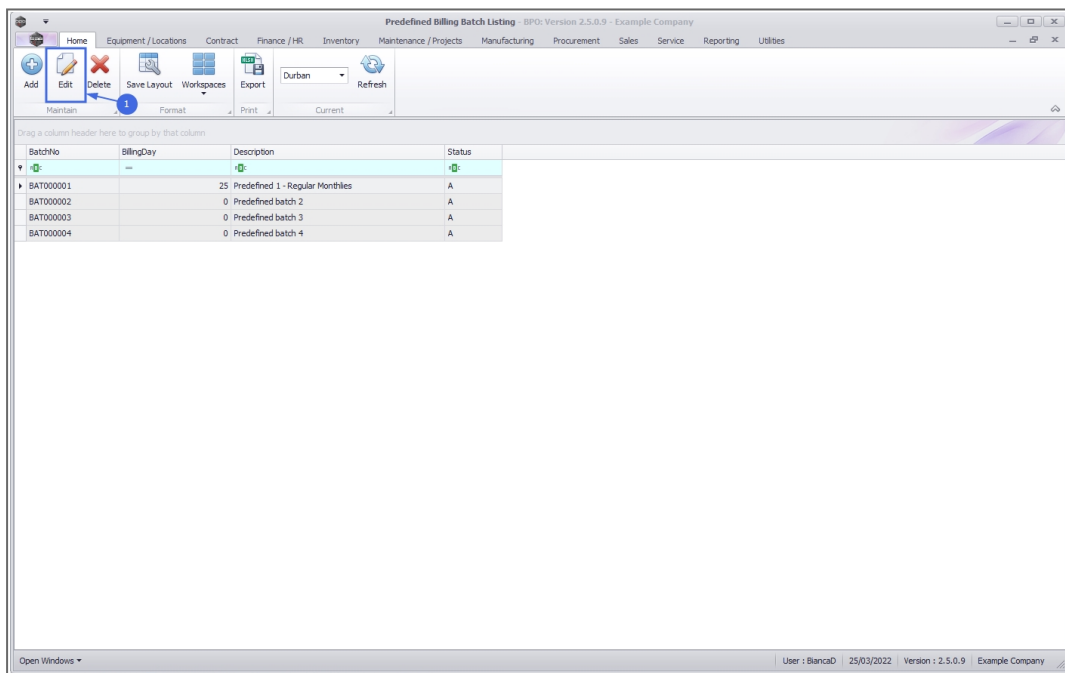
Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

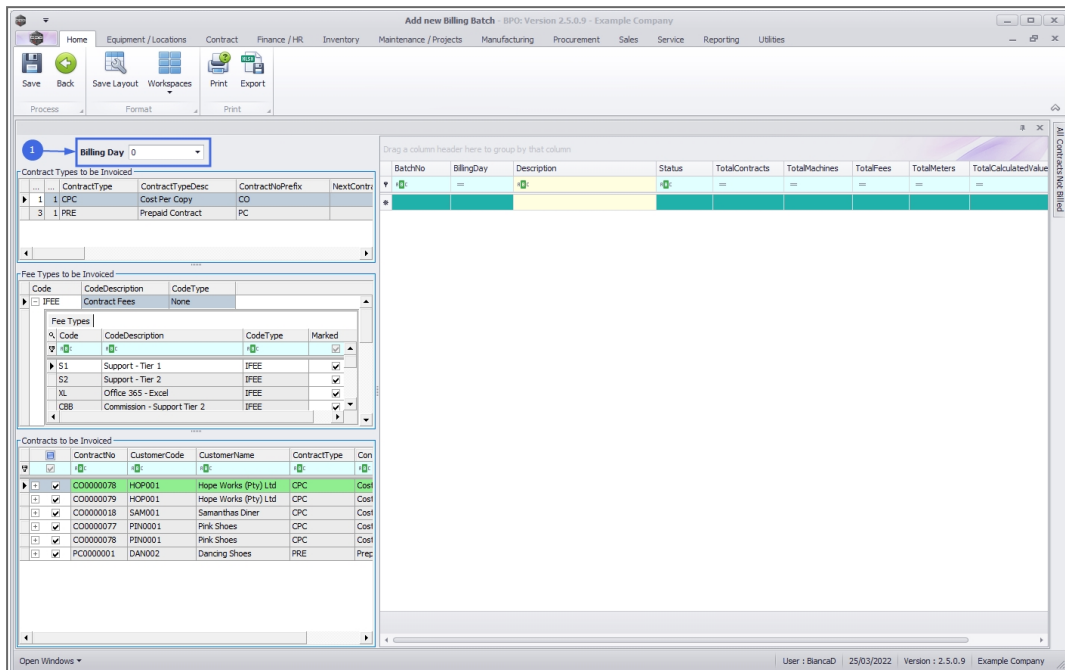


- Click on the **Edit** button.



BILLING DAY FILTER

- Filter the contracts listed by the relevant Billing Day



The screenshot shows the 'Add new Billing Batch' window with the following components:

- Top Menu:** Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, Utilities.
- Toolbar:** Save, Back, Save Layout, Workspaces, Print, Export.
- Billing Day Filter:** A dropdown menu set to 'Billing Day: 0'.
- Contract Types to be Invoiced:**

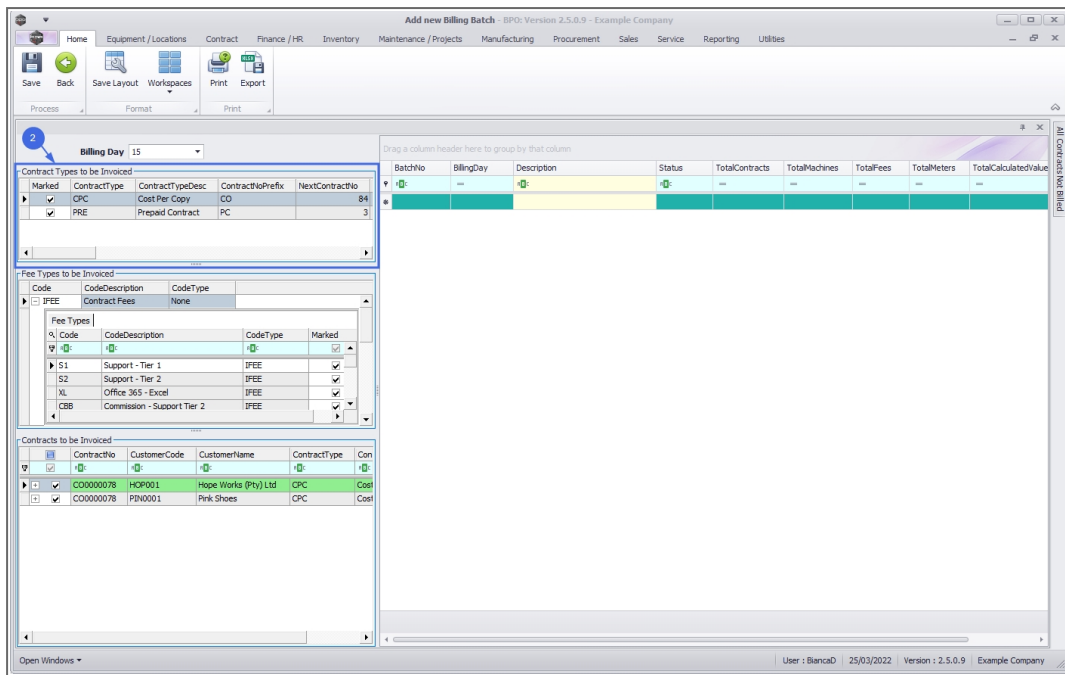
ContractType	ContractTypeDesc	ContractPrefix	NextCont
1 CPC	Cost Per Copy	CO	
3 PRE	Prepaid Contract	PC	
- Fee Types to be Invoiced:**

Code	CodeDescription	CodeType	Marked
IFEE	Contract Fees	None	
S1	Support - Tier 1	IFEE	☒
S2	Support - Tier 2	IFEE	☒
XL	Office 365 - Excal	IFEE	☒
CBB	Commission - Support Tier 2	IFEE	☒
- Contracts to be Invoiced:**

ContractNo	CustomerCode	CustomerName	ContractType	Con
CO0000078	HOP001	Hope Works (Pty) Ltd	CPC	Cost
CO0000079	HOP001	Hope Works (Pty) Ltd	CPC	Cost
CO0000018	SAM001	Samanthas Diner	CPC	Cost
CO0000077	PIN001	Pink Shoes	CPC	Cost
CO0000078	PIN001	Pink Shoes	CPC	Cost
PC0000001	DAN002	Dancing Shoes	PRE	Prep
- Main Table:** A table with columns: BatchNo, BillingDay, Description, Status, TotalContracts, TotalMachines, TotalFees, TotalMeters, TotalCalculatedValue.
- Status Bar:** User: BiancaD | 25/03/2022 | Version: 2.5.0.9 | Example Company

CONTRACT TYPES TO BE INVOICED FILTER

- This frame displays the contract types to filter by for the Contracts to be Invoiced frame.
- Select the relevant contract type(s).
- This will select or un-select the relevant contract type(s) linked to the contracts within the Contracts to be Invoiced frame.



Contract Types to be Invoiced

Marked	ContractType	ContractTypeDesc	ContractNoPrefix	NextContractNo
☒	CPC	Cost Per Copy	CO	84
☒	PRE	Prepaid Contract	PC	3

Fee Types to be Invoiced

Code	CodeDescription	CodeType	Marked
S1	Support - Tier 1	IFEE	☒
S2	Support - Tier 2	IFEE	☒
XL	Office 365 - Excel	IFEE	☒
CBB	Commission - Support Tier 2	IFEE	☒

Contracts to be Invoiced

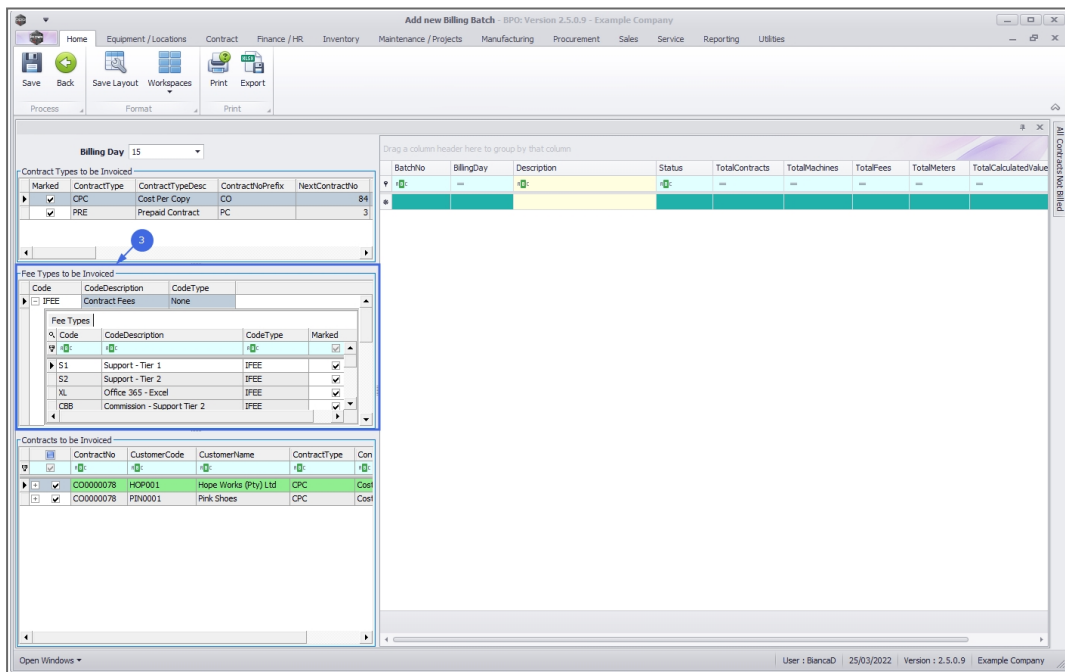
ContractNo	CustomerCode	CustomerName	ContractType	Con
CO0000078	HOP001	Hope Works (Pty) Ltd	CPC	Cost
CO0000078	PN0001	Pink Shoes	CPC	Cost

Batch Information Table:

BatchNo	BillingDay	Description	Status	TotalContracts	TotalMachines	TotalFees	TotalMeters	TotalCalculatedValue
1	15							

FEE TYPES TO BE INVOICED FILTER

- This frame displays the fees and/or meter types to filter by for on the Contracts to be Invoiced.



Contract Types to be Invoiced

Marked	ContractType	ContractTypeDesc	ContractNoPrefix	NextContractNo
☒	CPC	Cost Per Copy	CO	84
☒	PRE	Prepaid Contract	PC	3

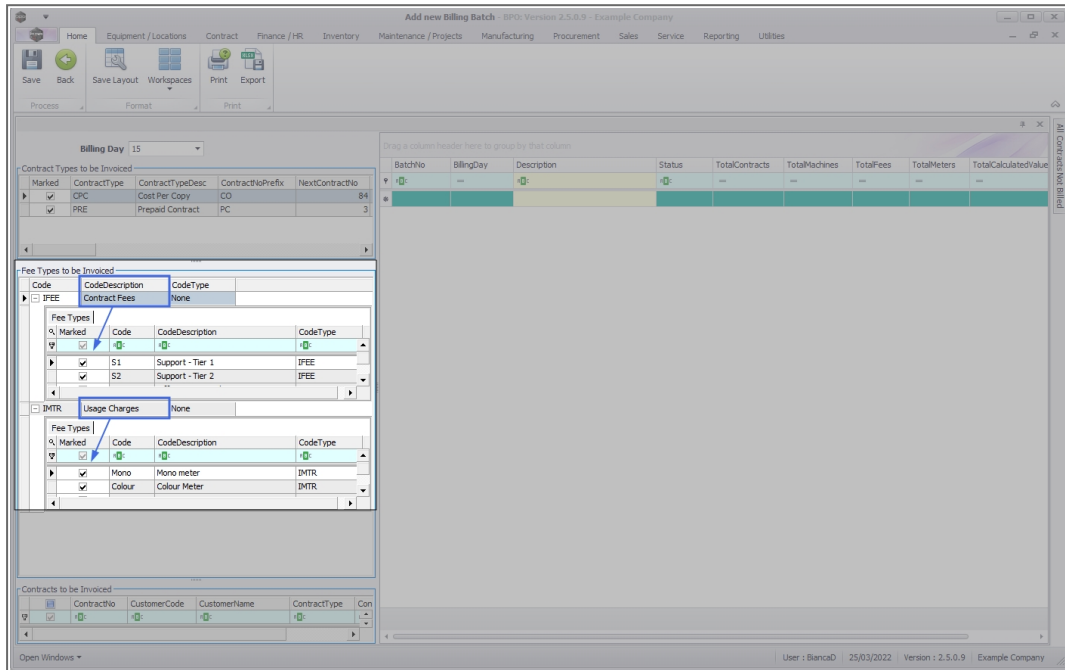
Fee Types to be Invoiced

Code	CodeDescription	CodeType	Marked
S1	Support - Tier 1	IFEE	☒
S2	Support - Tier 2	IFEE	☒
XL	Office 365 - Excel	IFEE	☒
CBB	Commission - Support Tier 2	IFEE	☒

Contracts to be Invoiced

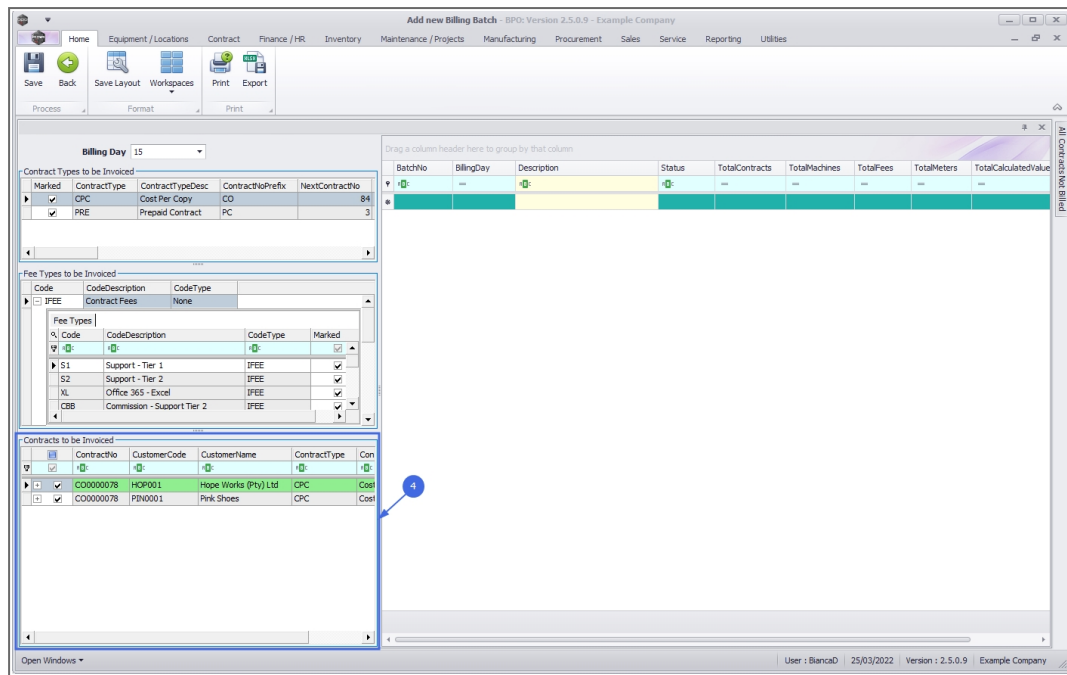
ContractNo	CustomerCode	CustomerName	ContractType	Con
CO0000078	HOP001	Hope Works (Pty) Ltd	CPC	Cost
CO0000078	PN0001	Pink Shoes	CPC	Cost

- Expand the Contract Fees and Usage Charges sub grids to mark the relevant fees or meters.
- This will select or un-select the relevant Contract Fees and/or Usage Charges linked to the contracts within the Contracts to be Invoiced frame.



CONTRACTS TO BE INVOICED FILTER

- Select the Contracts to be Invoiced within the Predefined Billing Batch.



Add new Billing Batch - BPO: Version 2.5.0.9 - Example Company

Billing Day: 15

Contract Types to be Invoiced:

Marked	ContractType	ContractTypeDesc	ContractNoPrefix	NextContractNo
☒	CPC	Cost Per Copy	CO	84
☒	PRE	Prepaid Contract	PC	3

Fee Types to be Invoiced:

Code	CodeDescription	CodeType	Marked
IFEE	Contract Fees	None	☒
S1	Support - Tier 1	IFEE	☒
S2	Support - Tier 2	IFEE	☒
XL	Office 365 - Excel	IFEE	☒
CBB	Commission - Support Tier 2	IFEE	☒

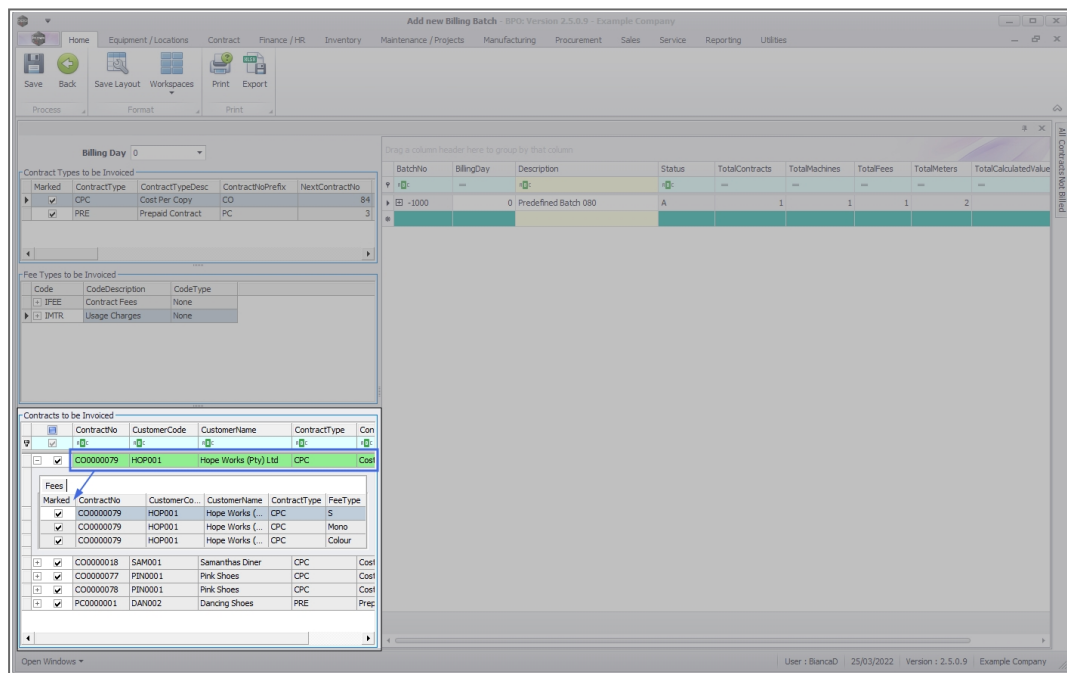
Contracts to be Invoiced:

ContractNo	CustomerCode	CustomerName	ContractType	Con
CO0000078	HOP001	Hope Works (Pty) Ltd	CPC	Cost
CO0000078	PN0001	Pink Shoes	CPC	Cost

Main Table:

BatchNo	BillingDay	Description	Status	TotalContracts	TotalMachines	TotalFees	TotalMeters	TotalCalculatedValue
1000	0	Predefined Batch 080	A	1	1	1	2	

- Expand the Fees subgrid to in order to check and/or further define which fees and/or meters should be included in the Pre-defined Billing Batch for the selected contracts.



Add new Billing Batch - BPO: Version 2.5.0.9 - Example Company

Billing Day: 0

Contract Types to be Invoiced:

Marked	ContractType	ContractTypeDesc	ContractNoPrefix	NextContractNo
☒	CPC	Cost Per Copy	CO	84
☒	PRE	Prepaid Contract	PC	3

Fee Types to be Invoiced:

Code	CodeDescription	CodeType
IFEE	Contract Fees	None
IMTR	Usage Charges	None

Contracts to be Invoiced:

ContractNo	CustomerCode	CustomerName	ContractType	Con
CO0000079	HOP001	Hope Works (Pty) Ltd	CPC	Cost
CO0000018	SAM001	Samanthas Diner	CPC	Cost
CO0000077	PN0001	Pink Shoes	CPC	Cost
CO0000078	PN0001	Pink Shoes	CPC	Cost
PC0000001	DAN002	Dancing Shoes	PRE	Prep

Fees:

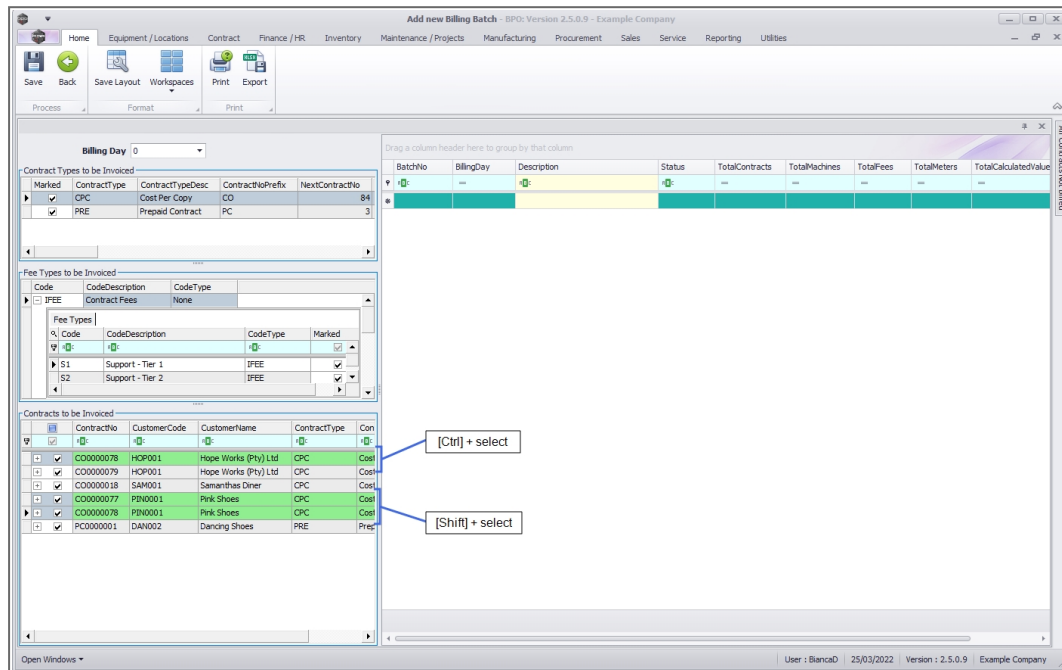
Marked	ContractNo	CustomerCo	CustomerName	ContractType	FeeType
☒	CO0000079	HOP001	Hope Works (Pty) Ltd	CPC	S
☒	CO0000079	HOP001	Hope Works (Pty) Ltd	CPC	Mono
☒	CO0000079	HOP001	Hope Works (Pty) Ltd	CPC	Colour

Main Table:

BatchNo	BillingDay	Description	Status	TotalContracts	TotalMachines	TotalFees	TotalMeters	TotalCalculatedValue
1000	0	Predefined Batch 080	A	1	1	1	2	

CONTRACTS TO BE INVOICED FILTER

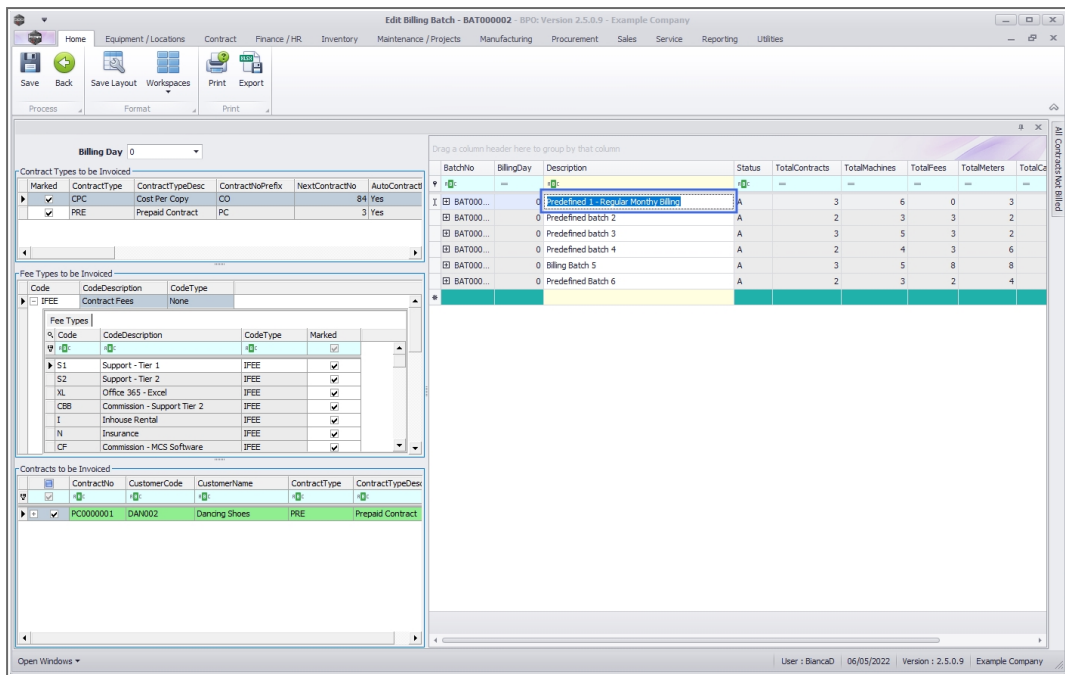
- You can either select all items in the list, or specific contracts:
 - Use either [Shift] + select or [Ctrl] + select to highlight the contracts to allocate to a new or existing batch.



- Then, whilst holding in the [Shift] or [Ctrl] key, drag and drop the selected items into the Billing Batch grid into a new line to create a new batch

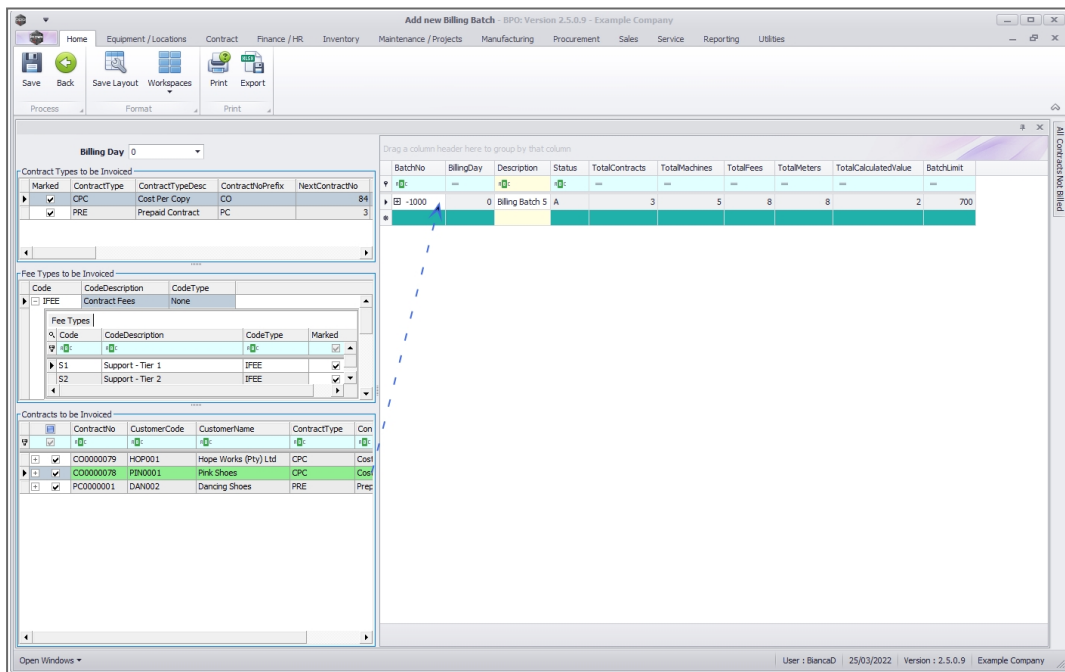
EDIT BATCH DESCRIPTION

- Type in a descriptive name for the Predefined Billing Batch.



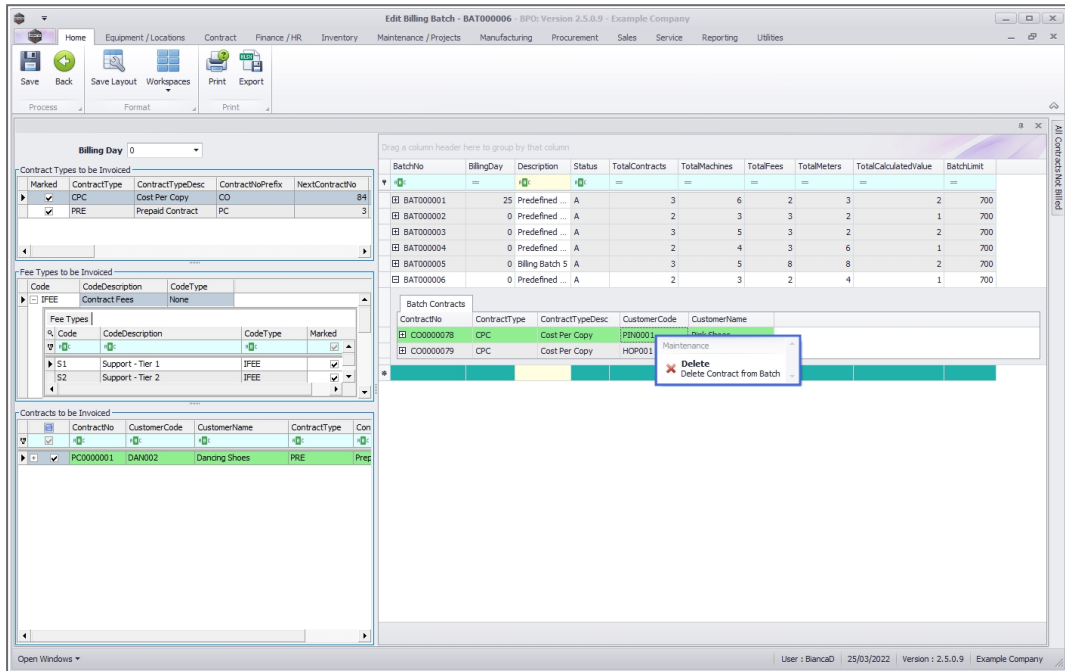
ADD CONTRACTS TO PREDEFINED BATCH

- Follow the same selection method described above, but this time drag the contract(s) into a Predefined Batch.

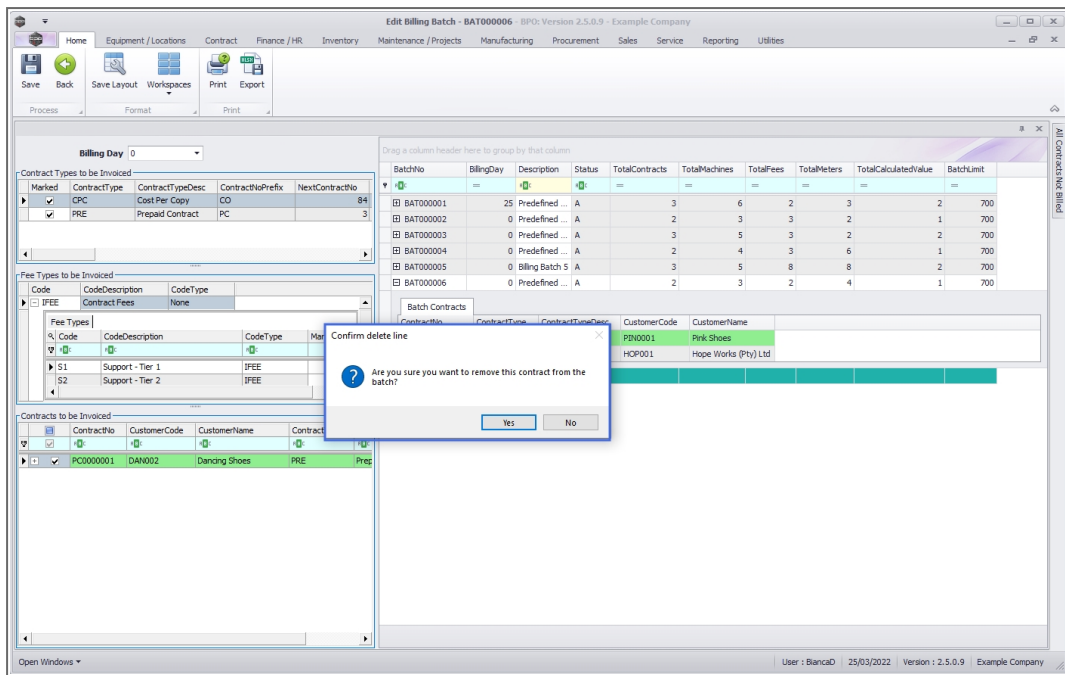


REMOVE CONTRACTS FROM A PREDEFINED BATCH

- If you have included a contract in a batch that should not be there, you can remove the contract from the batch by right clicking on it and selecting Delete Contract From Batch.

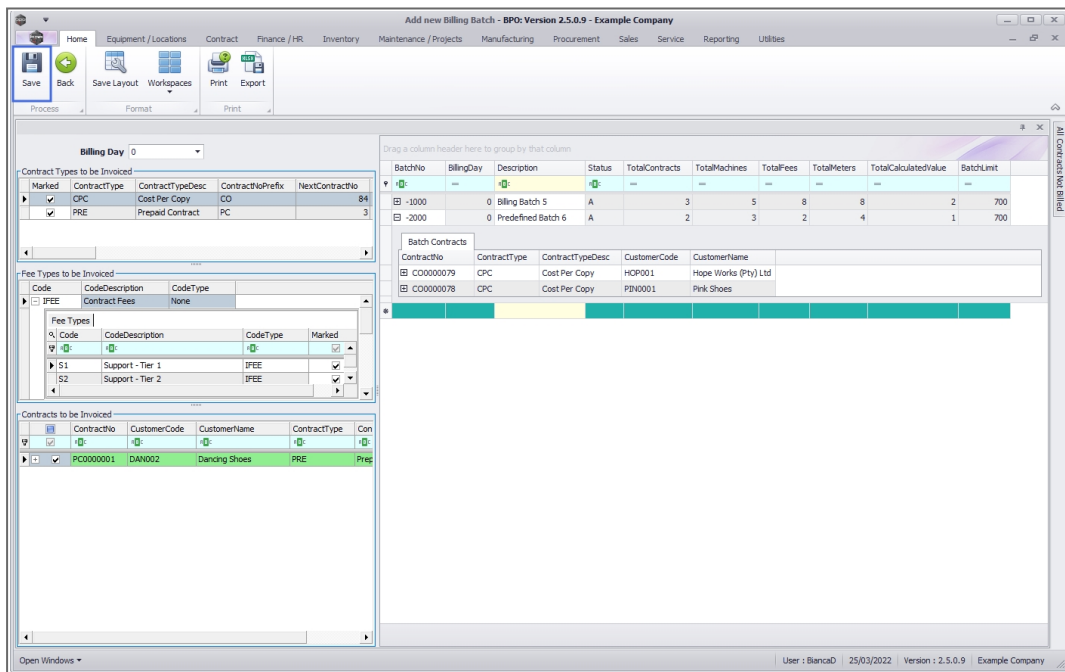


- A message box will come up, asking: "Are you sure you want to remove this contract from the batch?"
- Select **Yes**

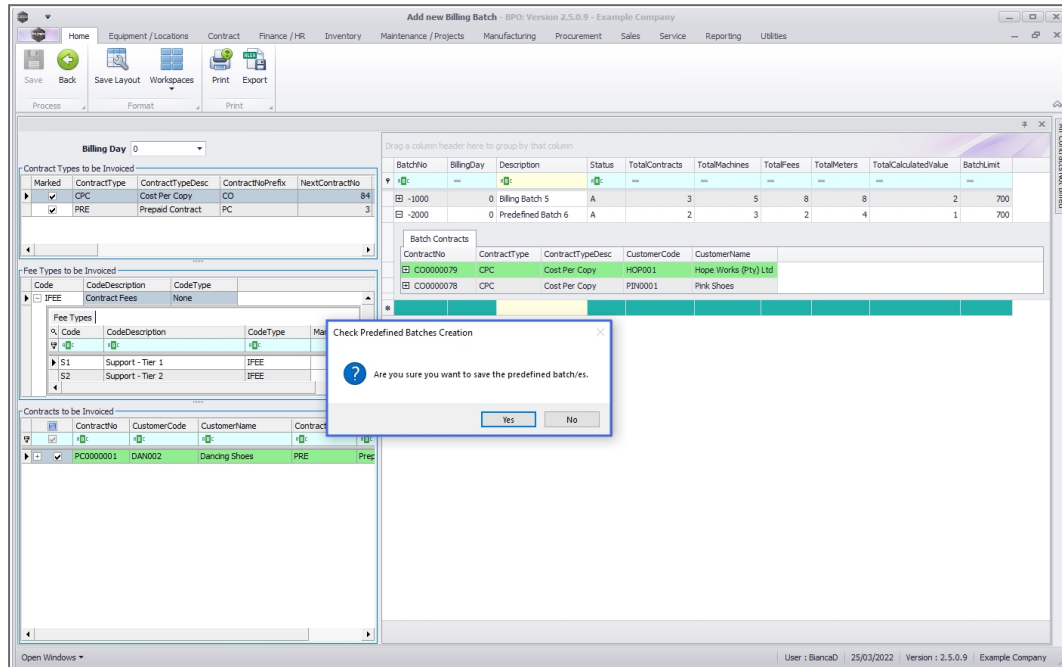


SAVE A PREDEFINED BATCH

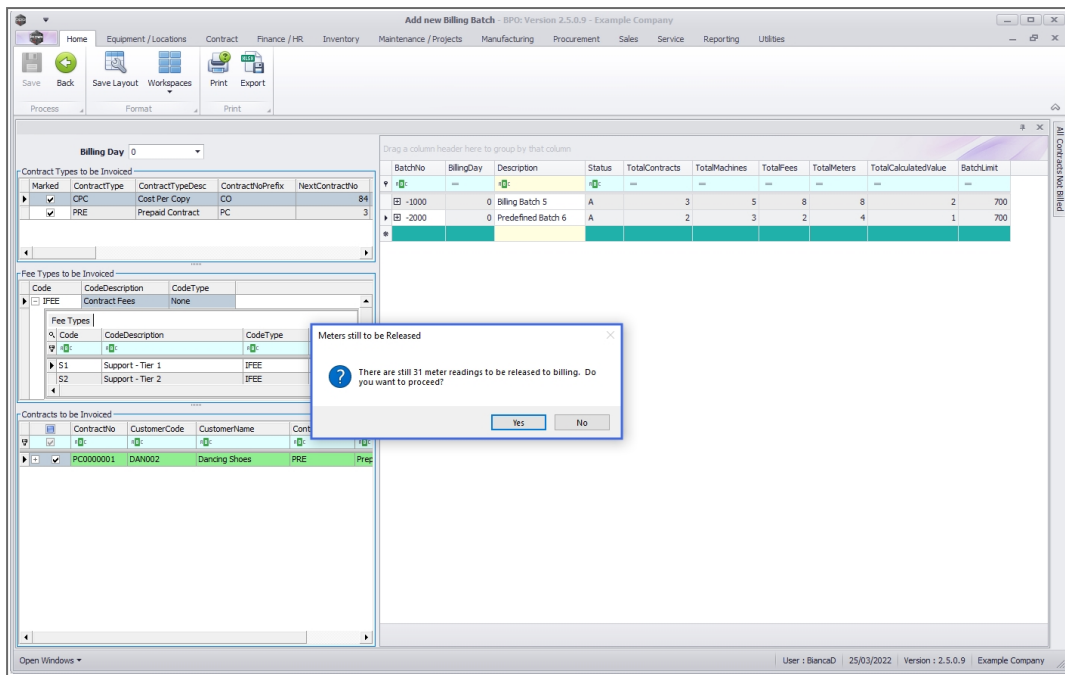
- Once you have configured all the batches, click on the **Save** button.



- A message box will come up, asking: "Are you sure you want to save the predefined batch/es?".
- Click on **Yes** if you are ready to save, otherwise click on **No** and continue configuring the batch(es), and save when you are ready.



- If you still have meter readings to release to billing, a message box will come up, asking: "There are still ... meter readings to be released to billing. Do you want to proceed?"
- If you are configuring batches, but not yet billing, you can continue by clicking on **Yes**, otherwise click on **No** and first make sure the meter readings are released, so that they are available to be billed when the batch is run, then come back to setting up your batches.



Add new Billing Batch - BPO: Version 2.5.0.9 - Example Company

Contract Types to be Invoiced

Marked	ContractType	ContractTypeDesc	ContractNoPrefix	NextContractNo
☒	CPC	Cost Per Copy	CO	84
☒	PRE	Prepaid Contract	PC	3

Fee Types to be Invoiced

Code	CodeDescription	CodeType
IFEE	Contract Fees	None
S1	Support - Tier 1	IFEE
S2	Support - Tier 2	IFEE

Contracts to be Invoiced

ContractNo	CustomerCode	CustomerName	ContractType	ContractTypeDesc
PC0000001	DAN002	Dancing Shoes	PRE	Prepaid Contract

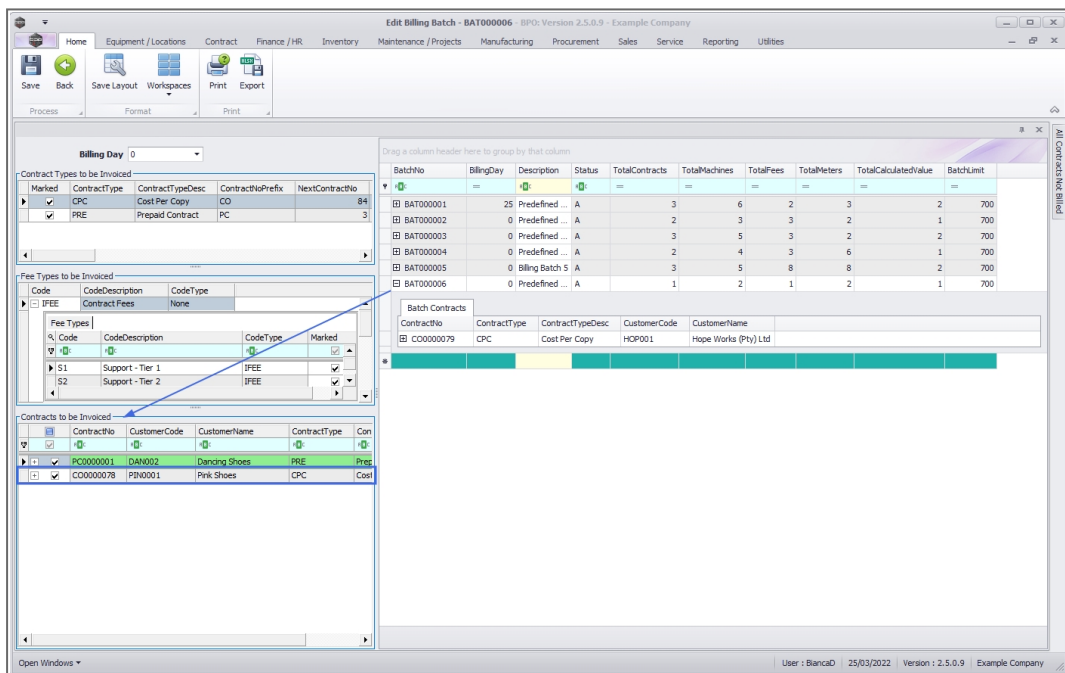
Meters still to be Released

There are still 31 meter readings to be released to billing. Do you want to proceed?

Yes No

User : BiancaD | 25/03/2022 | Version : 2.5.0.9 | Example Company

- The contract will be available again for selection in the Contracts to be Invoiced frame.



Edit Billing Batch - BAT000006 - BPO: Version 2.5.0.9 - Example Company

Contract Types to be Invoiced

Marked	ContractType	ContractTypeDesc	ContractNoPrefix	NextContractNo
☒	CPC	Cost Per Copy	CO	84
☒	PRE	Prepaid Contract	PC	3

Fee Types to be Invoiced

Code	CodeDescription	CodeType
IFEE	Contract Fees	None
S1	Support - Tier 1	IFEE
S2	Support - Tier 2	IFEE

Contracts to be Invoiced

ContractNo	CustomerCode	CustomerName	ContractType	ContractTypeDesc
PC0000001	DAN002	Dancing Shoes	PRE	Prepaid Contract
CO0000078	PN0001	Pink Shoes	CPC	Cost Per Copy

Meters still to be Released

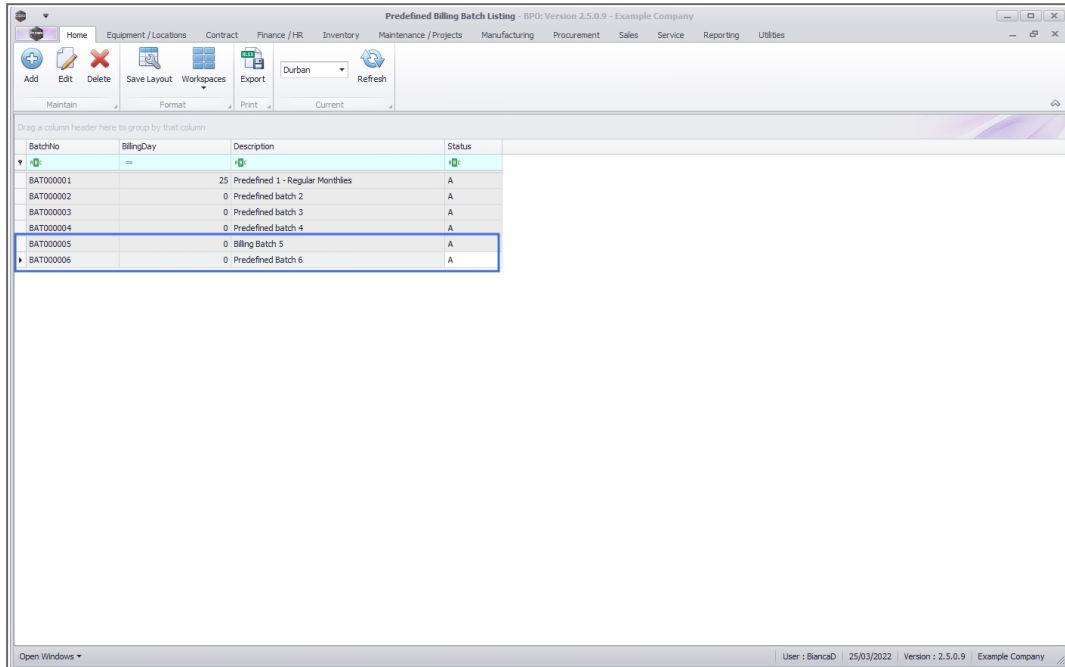
There are still 31 meter readings to be released to billing. Do you want to proceed?

Yes No

User : BiancaD | 25/03/2022 | Version : 2.5.0.9 | Example Company

VIEW PREDEFINED BATCH

- The batch(es) will now display in the Predefined Billing Batch listing screen.



BatchNo	BillingDay	Description	Status
BAT000001	25	Predefined 1 - Regular Monthlies	A
BAT000002	0	Predefined batch 2	A
BAT000003	0	Predefined batch 3	A
BAT000004	0	Predefined batch 4	A
BAT000005	0	Billing Batch 5	A
BAT000006	0	Predefined Batch 6	A

- Close this screen when you are done.

Related Topics

- [Add New Billing Batch](#)
- [Edit Billing Batch](#)
- [Delete Billing Batch](#)
- [Export Billing Batch](#)
- [Schedule Billing Batch](#)
- [Billing Batch Scheduler](#)

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