Machine Billing

ECi

ECi DDMS®

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About Machine Billing

ECi has worked diligently to re-design the Machine Billing window. This updated, graphical version includes the new functionality of the EBS SQL database. Using SQL/.NET technology, Machine Billing tasks display in a brand new, easy to use panel. This panel gives you added flexibility when limiting, filtering, sorting, customizing, and updating your machine data.

When viewing machine data, information appears in an Excel-style grid with columns that can be fully customized. Once you set limits, the data can be saved to a template, exported to an XLS spreadsheet, or exported to a PDF file. Since results are significantly faster, and provide nearly real-time information, machine billing has never been easier.

The new Machine Billing window combines the following tasks in a single user interface:

- **Machine Meter Readings:** Before you can bill your meters, you must enter meter readings. To bill meters means to bill contracts based on the number of clicks that the customer used. You can email or fax the customer to request a meter reading without leaving the Meter Readings window, making billing your meters both flexible and convenient.
- **Machine Billings:** To automate the process of billing, you can let the system determine what needs to be billed using the Machine Billing window. When you do, you can specify to print consolidated or non-consolidated pick tickets and set limits for the machines to bill. The boxes in the Machine Billing window let you include All Billings, as well as Cycle, Meter, Lease, or any combination. If needed, you can also re-enter a machine meter reading without leaving the window.
- **Machine Renewals:** When you generate renewals, the Machine Billing window gives you the greatest control and flexibility over the renewal process. When you're ready to renew, you use the Update Renewals window to complete the renewal procedure.

Before You Begin

Before you can begin using Machine Billing, you must:

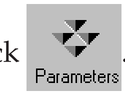
- Install the latest version of DDMS software, 10.3.0 or later.
- ***WARNING:*** You ***must*** also import your data through the new EBS SQL Import Panel. Be sure to import your file information and then set up a schedule for importing machine data. Do NOT proceed with these instructions until you do so. For details, see *Using the EBS SQL Import Panel* handout by visiting our website at www.ddms.com/Resources/Support/faq/utilities/EBSSQLimport.pdf.

Setting Up Machine Billing Parameters

The following steps describe the available parameters you can use with the Machine Billing and Renewals features.

You specify contact details using the Serial Contacts window. This includes the contact's name, fax, and email address. For more information, see the ECi DDMS online help topic **Using the Serialized Contact Window**.

1. In DDMS, double-click 

and then double-click 

.
2. Double-click Serialized and then double-click General Configuration. See Figure 1.
3. Click the Meter Readings Contract Type box and enter a default contract type to use when emailing and faxing meter requests.
4. Click the Renewal Contact Type box and enter a default contact type that you can use when exporting renewal information. Once exported to a spreadsheet, the data can be used in the format of your choice and sent to your customers.
5. When finished, click  to save your changes.
6. Click  to close the Parameter Editor window.

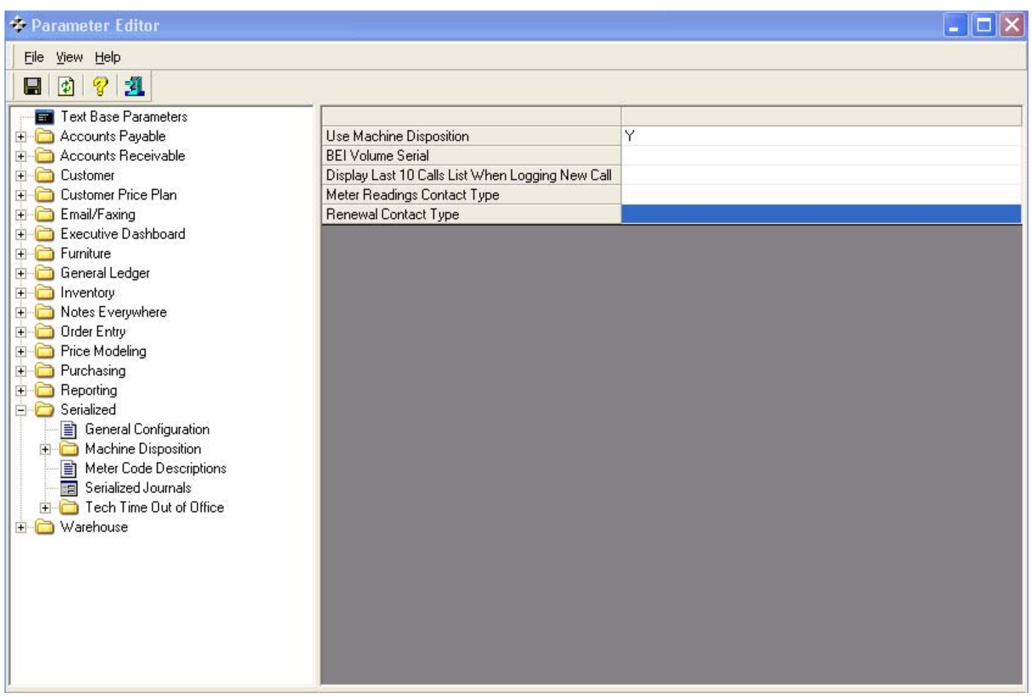


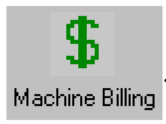
Figure 1: Serialized Parameters

Entering Meter Readings

Before you can bill meters, you must enter meter readings. To bill meters means to bill contracts based on the number of clicks the customer used. This information shows you how to mass add meter readings. When you select the Mass Add option, the system determines which meters are due for billing.

1 In DDMS, double-click 

. The Machines Menu opens.

2 Double-click 

. The Machine Billing window opens.

3 Under the Machine Tasks section, click Meter Readings. See Figure 2.

4 Choose the Mass Add option to add meter readings. Select the View/ Change Pending option to view or edit pending meter readings.

5 Specify which meter type to include. You can include meters for which you have entered readings, new meters that do not have readings, or both.

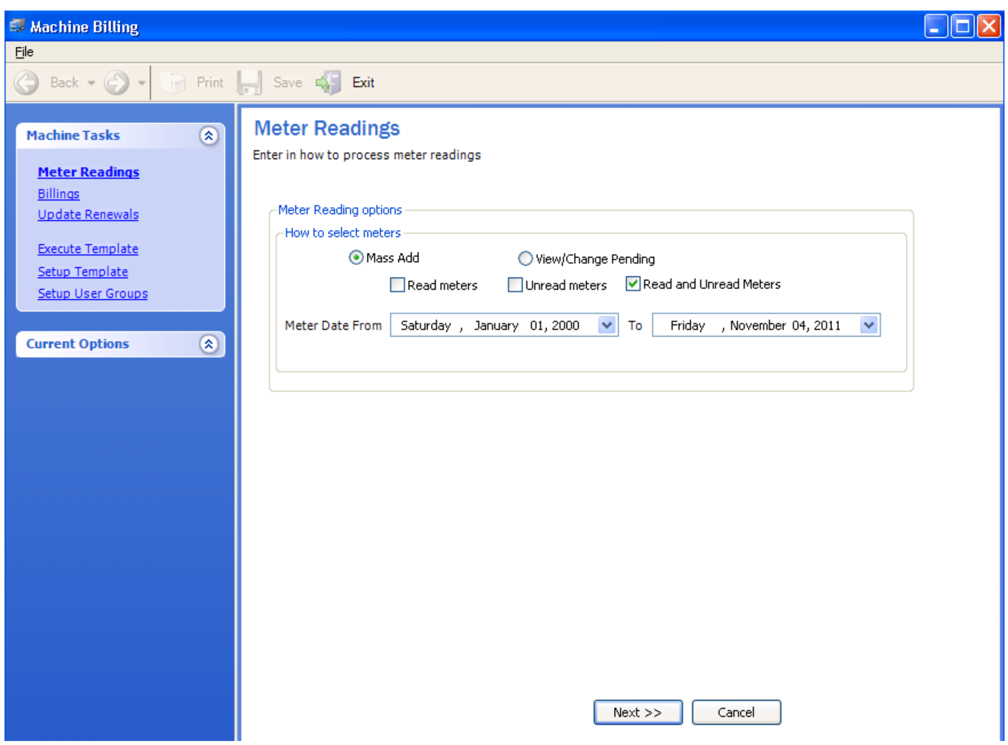


Figure 2: The Meter Readings Window

Choose from the following options:

Read Meters: Include only meters that have readings entered.

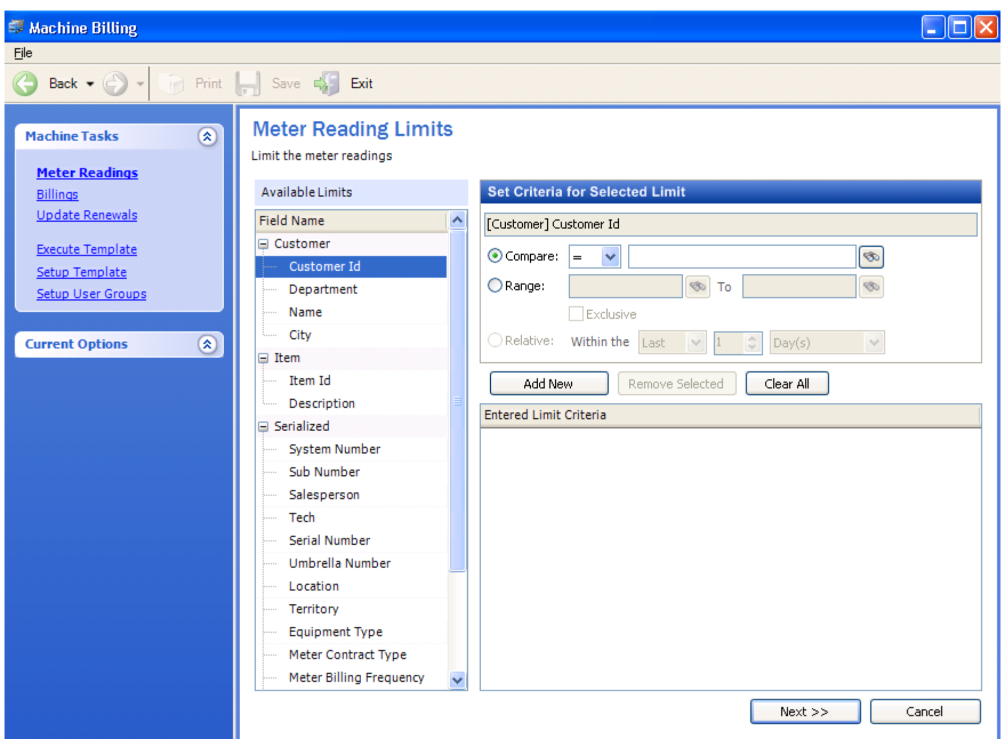
Unread Meters: Include only meters that do not have readings entered.

Read and Unread: Include both types of meters.

6 In the Meter Reading Date From and To boxes, click the down arrow to select the beginning and ending dates for the meters to include. The date you enter is compared with the last bill date, the last meter reading date, and the billing frequency to determine which meters need new readings. Suppose you bill the meter each month and the meter was last billed on 03/01/11, if you enter 04/01/11 or later as a limiting date, the meter is now due for billing because one month has elapsed since the last meter reading.

Note: The reading date you enter determines which meters are included when you bill meters in the (EZY) Serial Maintenance Report Selection screen. If the date you enter here is earlier than the date you specify when running billings, the meters are not included. Suppose you enter a reading date of 03/05/11 and enter 20 meter readings. If you enter a date of 03/01/11 when you generate billings, those 20 meters are not included.

Figure 3: Setting Limits



If the data exceeds 20,000 records, a warning message opens. Set more limits to narrow your search.

7 Click Next.

8 In the Available Limits section, set limits for the meters to include. For details, see the heading **Settings Limits**. See Figure 3.

9 When finished setting limits, click Next.

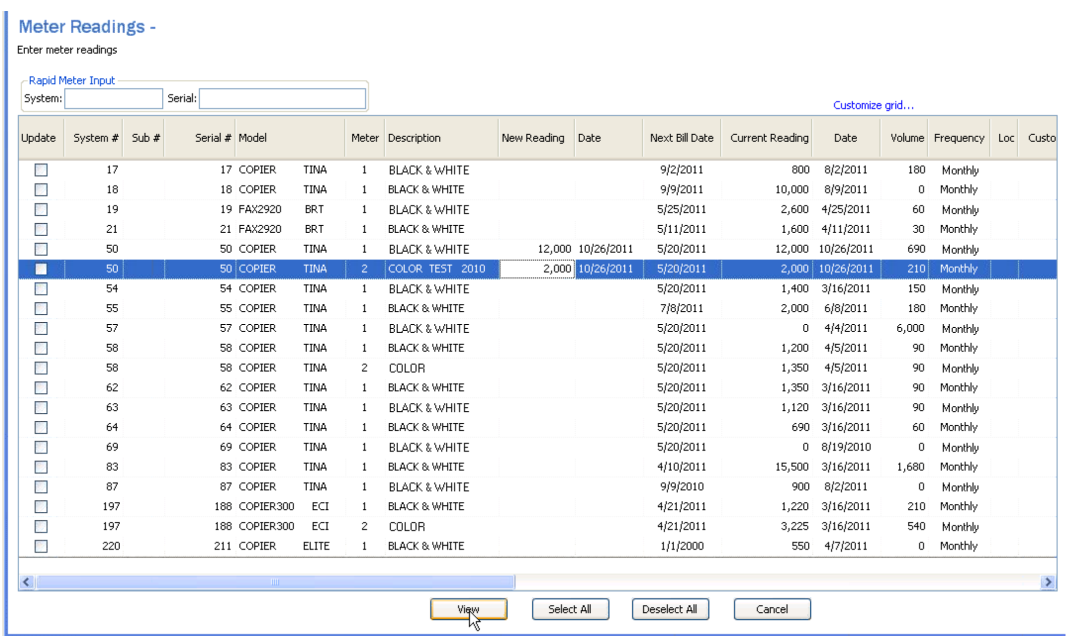
10 The system displays the meters that meet the limits you set and those which are also due for billing. Additional meter information also appears, including the meter number in the Meter box. The reading from the last billing and date are shown in the Current Reading and corresponding Date boxes. To begin entering meter readings, you can select one of the displayed meters, you can search for the correct meter, you can add a meter not shown in the list, and you can email or fax a meter reading request. See the headings below.

Entering a Meter Reading

1 Select one of the displayed meters to highlight.

2 Click the corresponding New Reading box and enter the reading.

3 After entering the meter reading, you can press Tab to change the date or press Enter to move to the next line. If you press Tab, the cursor moves to the Data box. This allows you to change the default date for the next reading you specify. If you press Enter, the cursor automatically moves to the next line so you can enter the next meter reading. Continue to change as many meter readings as necessary. See Figure 4.



Update	System #	Sub #	Serial #	Model	Meter	Description	New Reading	Date	Next Bill Date	Current Reading	Date	Volume	Frequency	Loc	Custo
	17		17	COPIER TINA	1	BLACK & WHITE			9/2/2011	800	8/2/2011	180	Monthly		
	18		18	COPIER TINA	1	BLACK & WHITE			9/9/2011	10,000	8/9/2011	0	Monthly		
	19		19	FAX2920 BRT	1	BLACK & WHITE			5/25/2011	2,600	4/25/2011	60	Monthly		
	21		21	FAX2920 BRT	1	BLACK & WHITE			5/11/2011	1,600	4/11/2011	30	Monthly		
	50		50	COPIER TINA	1	BLACK & WHITE	12,000	10/26/2011	5/20/2011	12,000	10/26/2011	690	Monthly		
	50		50	COPIER TINA	2	COLOR TEST 2010	2,000	10/26/2011	5/20/2011	2,000	10/26/2011	210	Monthly		
	54		54	COPIER TINA	1	BLACK & WHITE			5/20/2011	1,400	3/16/2011	150	Monthly		
	55		55	COPIER TINA	1	BLACK & WHITE			7/8/2011	2,000	6/8/2011	180	Monthly		
	57		57	COPIER TINA	1	BLACK & WHITE			5/20/2011	0	4/4/2011	6,000	Monthly		
	58		58	COPIER TINA	1	BLACK & WHITE			5/20/2011	1,200	4/5/2011	90	Monthly		
	58		58	COPIER TINA	2	COLOR			5/20/2011	1,350	4/5/2011	90	Monthly		
	62		62	COPIER TINA	1	BLACK & WHITE			5/20/2011	1,350	3/16/2011	90	Monthly		
	63		63	COPIER TINA	1	BLACK & WHITE			5/20/2011	1,120	3/16/2011	90	Monthly		
	64		64	COPIER TINA	1	BLACK & WHITE			5/20/2011	690	3/16/2011	60	Monthly		
	69		69	COPIER TINA	1	BLACK & WHITE			5/20/2011	0	8/19/2010	0	Monthly		
	83		83	COPIER TINA	1	BLACK & WHITE			4/10/2011	15,500	3/16/2011	1,680	Monthly		
	87		87	COPIER TINA	1	BLACK & WHITE			9/9/2010	900	8/2/2011	0	Monthly		
	197		188	COPIER300 ECI	1	BLACK & WHITE			4/21/2011	1,220	3/16/2011	210	Monthly		
	197		188	COPIER300 ECI	2	COLOR			4/21/2011	3,225	3/16/2011	540	Monthly		
	220		211	COPIER ELITE	1	BLACK & WHITE			1/1/2000	550	4/7/2011	0	Monthly		

Figure 4: Entering a Meter Reader

Adding a Meter

1. In the Current Options section, click the Add Meter Readings link.
2. In the System box, enter the system number. You can also click the Serial # box to narrow the search by system and serial number.
3. Press Enter.
4. When the meter is shown, click the corresponding New Reading box and enter the reading.
5. Press Enter.
6. After entering the reading, press Esc to return the cursor to the System or Serial box to quickly retrieve the next meter. You can also type **ALT+Y** and **ALT+E** at any time to move the cursor to the System and Serial boxes, respectively.

Deleting a Meter Reading

1. Click the meter reading to delete.
2. In the Current Options section, click Delete Meter Reading. You can also right-click and choose Delete Meter Reading.
3. If the message Meter Has Reading in Z-M-Bill File appears, click OK.
4. When the Meter/Detail History window opens, select the meter reading to which this meter should be reverted. Go to the heading **Completing the Meter Reading Procedure**.

Searching for a Machine

1. Click the System box and/or Serial box and enter the machine information. Press Enter.
2. When the meter is shown, click the corresponding New Reading box and enter the reading.
3. After entering the reading, press Esc to return the cursor to the System or Serial box to quickly retrieve the next meter. You can also type **ALT+Y** and **ALT+E** at any time to move the cursor to the System and Serial boxes, respectively. Go to the heading **Completing the Meter Reading Procedure**.

To use this feature, you must also be set up and using AutoCommII.

Emailing/Faxing Meter Reading Requests

You can easily email or fax the customer a meter reading request. The system uses the default contract type for meter readings set in the Meter Readings Contract Type box in the Serialized General Configuration parameters. Formats for meter reading requests are set in the Meters Fax and Meters Email fields in the text-based (L6T) Fax Parameters screen.

1. Click the meter for which to request a reading.

2 Scroll over to view the Contact column. This column defaults to the customer's serialized contact set up in the Serialized Contact window. The customer's preference, Email or Fax, displays in the Pref column (E for email, F for fax). The default email address or fax number is shown in the Email or Fax column. You can use this information to email or fax the meter reading request, you can change the information, or you can add new contact information. If you change or add new contact information, you can use the detail for this meter request only, or you can save it to use later. This information is saved to the Serialized Contact window.

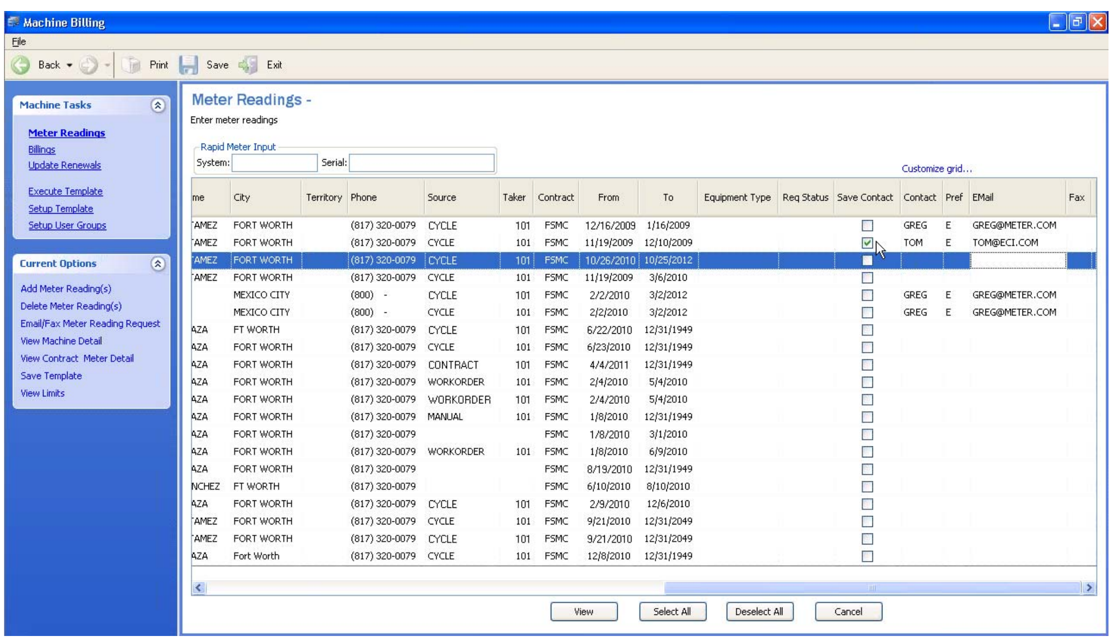
3 To add a new contact or change an existing one, click the Contact box and enter the contact's name. You can enter up to 30 characters.

4 Click the Email or Fax box and enter the email address or fax number to use for this request. You can enter up to 50 characters when emailing, 10 characters when faxing.

5 To update or save this contact's information to the Serialized Contact window, click the Save Contact box. See Figure 5. The information is saved for future use. If you leave the Save Contact box blank, the information you specified is used for this meter reading request only. To use this information again, you must re-enter it.

6 In the Current Options section, click Email/Fax Meter Reading Request. You can also right-click and choose Email/Fax Meter Reading Request. If more than one request is made to the same contact, the customer only receives one request. All machine meter requests appear on a single fax or email.

Figure 5: Saving Contact Detail



7 When prompted to enter a subject line, enter for example, Meter Reading Request and click OK. You can enter up to 50 characters. The text you enter is used for the entire group of meter requests you are emailing or faxing, not for each machine, meter, or email address/fax number.

8 At the Request for Meter Readings is Complete message, click OK. The request is sent using the information you specified. The Req Status column is updated with the text Yes for the meter(s) requested. If you also specified new contact information and clicked the Save Contact box, the information is saved to the Serialized Contact window. For more details, see the topic **Using the Serialized Contact Window** in your ECi DDMS online documentation.

Completing the Meter Reading Procedure

1 If you enter a meter reading, when you finish, the Update box is checked by default. You can also click the Update check box corresponding to each meter to update. To select all meters shown, click the Select All button.

2 Click the Save button. The Z-M-BILL file is updated with the meter reading information you specified. The Current Reading Clicks and Date boxes in the Contract Detail Meter tab are also updated.

3 Click Exit to close the Machine Meter Readings window. When you are ready, you can generate your contract billings.

Note: In addition to entering meter readings, this window has been designed to let you perform a variety of useful functions, including saving and executing templates, viewing additional information, and printing the data shown. For details, see the heading **Additional Machine Billing Functions**.

Generating Contract Billings

The Machine Billing window helps automate the process of billing by letting the system determine what needs to be billed and automatically generating billings for you. When you generate billings, you can include only contracts, only meters, only leases, or all three.

Note: You can also include Renewals. For details on generating billings along with renewals, see the heading **Generating Renewal Pick Tickets** for details.

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1 In the Machine Billing window, under Machine Tasks, click Billings. The Machine Billings window opens, shown in Figure 6.

2 Use the boxes in the Machine Billing window to select the billings to include. You can include All Billings, Cycle, Meter, Lease, or any combination. Click the options for which to generate machine billings.

3 Set the following boxes for the billings to generate: Billing Date From/To, Pick Status, Invoice Date, Consolidated/Non-Consolidated/Per Machine, and Invoice Note.

Note: The Renewals options let you specify how to handle your contract renewals. If you are generating billings along with renewals, see the heading **Generating Renewal Pick Tickets** for details.

If the data exceeds 20,000 records, a warning message opens. Set more limits to narrow your search.

4 When finished, click Next.

5 In the Available Limits section, set limits to include. For details, see the heading **Setting Limits**.

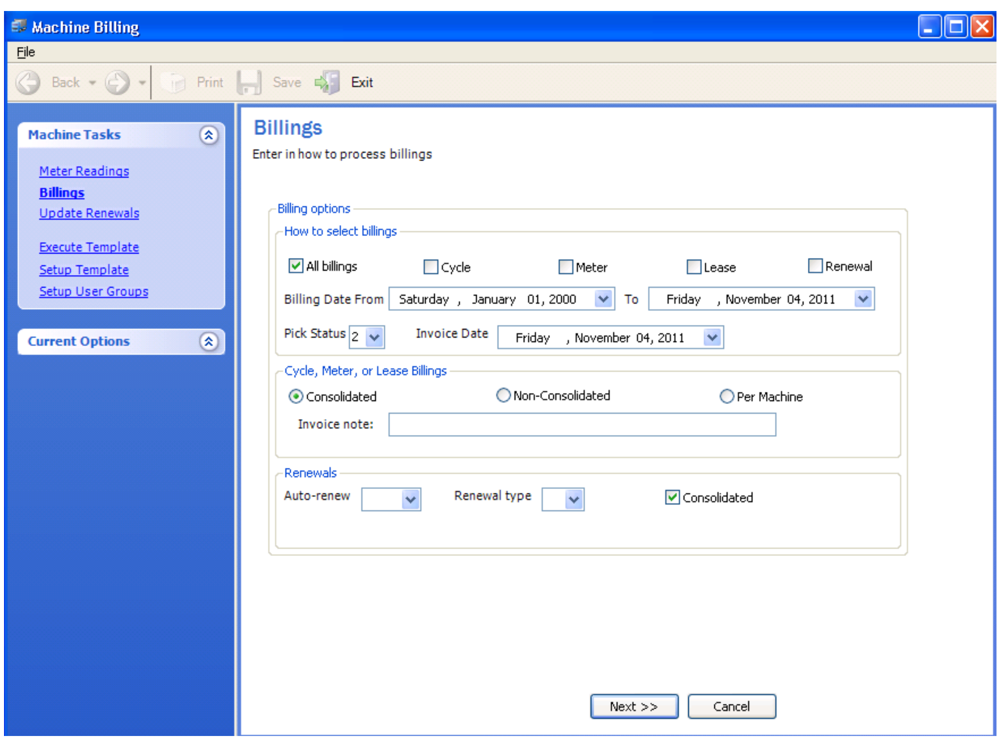
6 After setting limits, click Next.

7 The machines that meet the limits you set and which are also due for billing appear. If a meter reading is incorrect, you can easily change it.

7.1 Click the machine in the list that contains the meter to change.

7.2 The meters for the contract selected appear in the bottom section of the window.

Figure 6: The Machine Billing Window



7.3 To change a meter reading, right-click the meter to change and select Re-enter Meter Reading. See Figure 7.

7.4 At the Enter Password prompt, enter the password set in the Delete field in the (EZ1S) screen.

7.5 At the You Must Revert to a Previous Meter Reading prompt, click OK.

7.6 When the Meter History dialog box opens, click the previous reading to which to revert this meter and click OK.

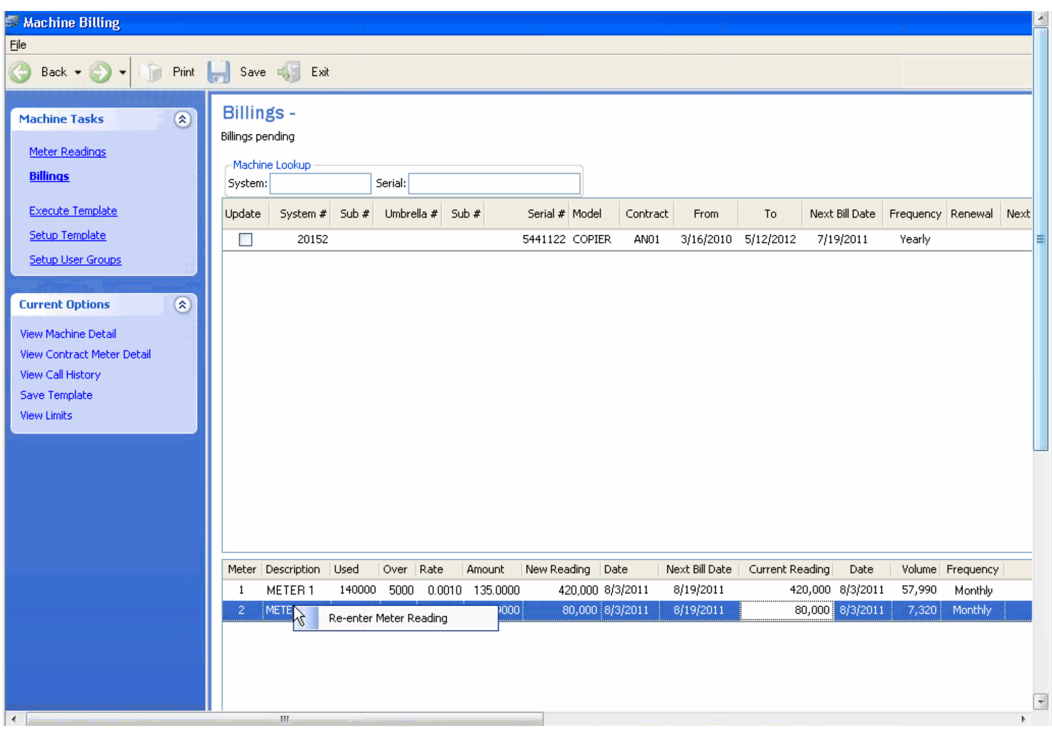
7.7 In the New Reading box, specify the new reading and click OK.

7.8 Use Steps 7.1 through 7.8 to change as many meter readings as necessary.

8 When finished making changes, click the Update check box corresponding to each contract to bill. You can also click the Select All button to check all the contracts shown.

9 Click the Process button. The Contract Billing Reports prints and the pick tickets are generated. The machines that are actually being billed appear in green text. The Invoice column displays the Invoice number, and the text Billings Pending appears under the Billings heading at the top of the window. See Figure 8.

Figure 7: Re-Entering a Meter Reading



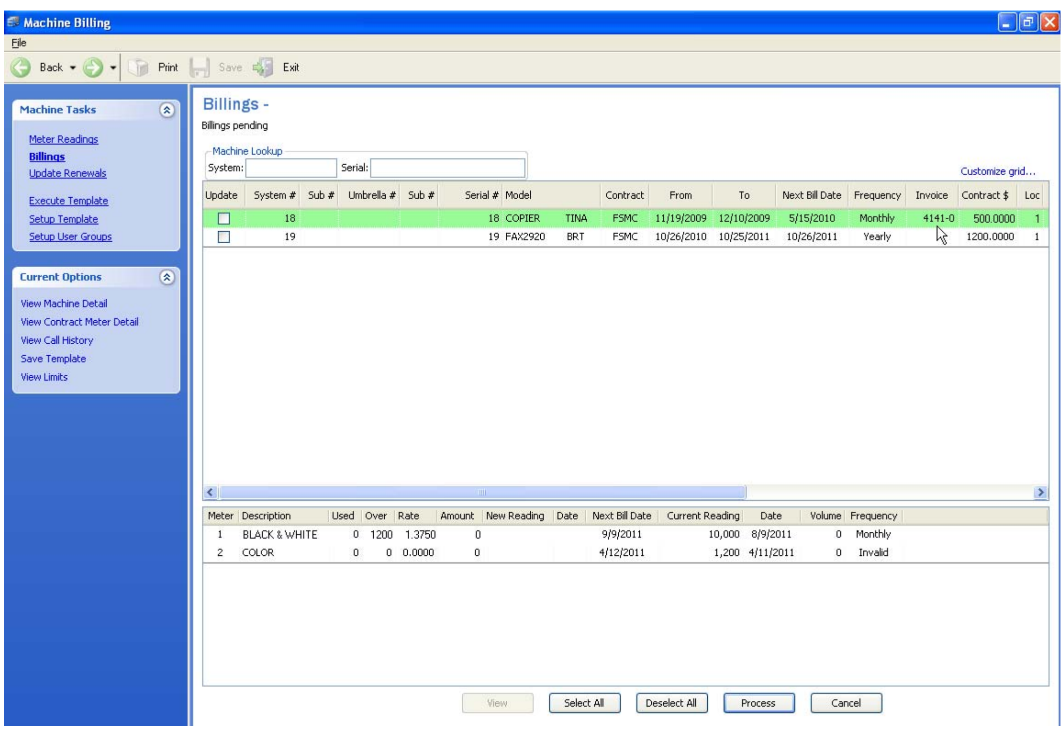
10 To complete the billing process, you must print your invoices in the Standard Order Entry Reports screen. Whether you batch print your pick tickets or print your invoices depends on how you end your pick tickets when you generate your billings.

If you end your pick tickets at a status 2 when generating billings, as we recommend, select the [A] Picking Tickets function in the Standard Reports screen. For details, see the **Printing Picking Tickets** topic in your ECi DDMS online documentation.

If you end your pick tickets at a status 8 when generating billings, select the [B] Invoices function in the Standard Reports screen. For details, see the **Printing Invoices** topic in your ECi DDMS online documentation. Go to the heading **Generating Renewal Pick Tickets**.

Note: In addition to entering meter readings, this window has been designed to let you perform a variety of useful functions, including saving and executing templates, viewing additional information, and printing the data shown. For details, see the heading **Additional Machine Billing Functions**.

Figure 8: The Machines To Be Billed Display in Green Text



Generating Renewal Pick Tickets

When you generate renewals, the Machine Billing window gives you the greatest control and flexibility over the renewal process. To generate renewals, you must first create the pick tickets.

Note: If you haven't done so, you should print the To Be Renewed Report in the text-based (EZY) screen before generating renewals. Printing the report first allows you to review the information and make any changes that are necessary. Once the information is correct, you can generate the billings. For details, see the topic **Printing the To Be Billed Report** in your ECi DDMS online documentation.

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1. In the Machine Billing window, under Machine Tasks, click Billings.
2. Click the Renewal option to include renewals, shown in Figure 9. (You can also click additional options to create billings. For details, see the previous heading **Generating Contract Billings**.)
3. Click the Billing Date From and To boxes to enter the date to generate renewals, or click the down arrow to select the dates using the calendar. The date you select is used together with the number of days before the contract expires (set in the Days box in the Contract Types Renewals tab) to determine the contracts due for renewal. (This applies only to contracts based on dates.)

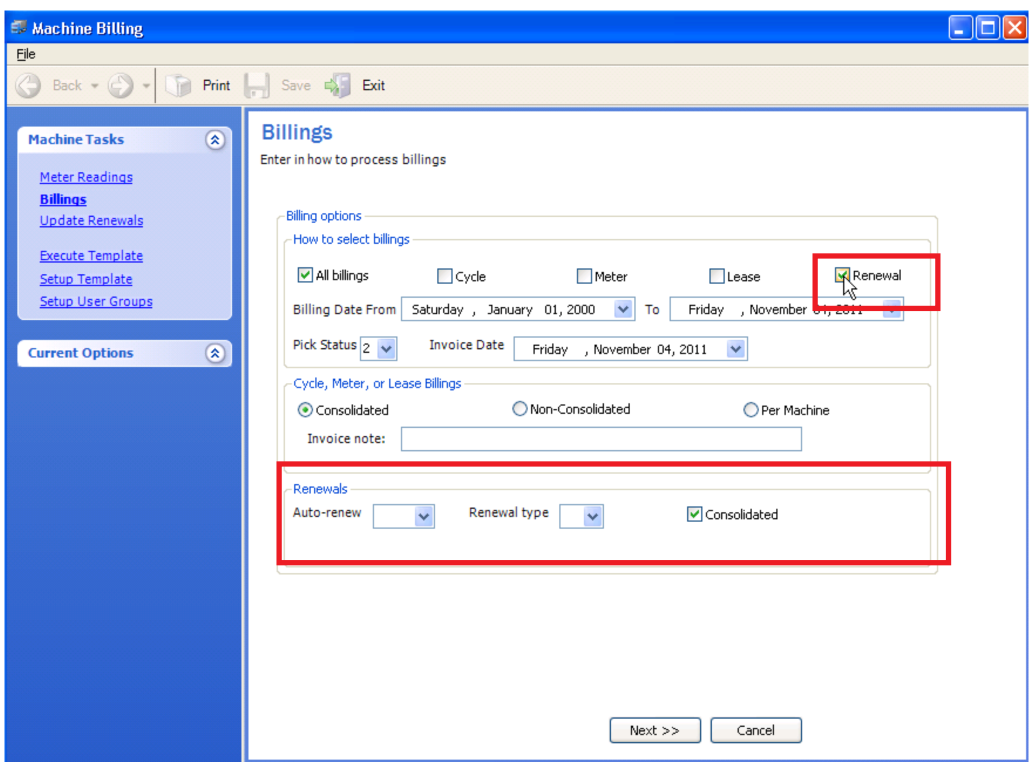


Figure 9: The Update Renewals Window

4 In the Pick Status box, select the status of the tickets to be generated. Press Tab to accept the default of status 2, or enter the status at which to end this ticket. (We recommend that you end your pick tickets at a status 2. This helps keep your renewal tickets separate from other tickets.)

5 Click the Invoice Date box to specify the date to print on the invoices you generate, or click the down arrow to select the date using a calendar. The date you specify is also the date that you use when processing the invoice in accounts receivable.

6 Click the down arrow in the Auto-Renew box and choose All to automatically renew all contracts, Yes to renew contracts waiting to be updated, No to renew only new contracts, or X to remove open-ended contracts stored in the file.

7 Click the down arrow in the Renewal Type box and choose All to include all contracts that need renewal, including those that were previously invoiced and are waiting to be updated. Click New to include only new contracts, or click Past to include those contracts that were previously invoiced and are waiting to be updated.

8 Click the Consolidated box to place all contract renewals, including the customer departments, on a single invoice.

If the data exceeds 20,000 records, a warning message opens. Set more limits to narrow your search.

9 After setting limits, click Next.

10 The contracts that meet the limits you set and which are also due for renewal appear. If necessary, you can re-enter a meter reading. For details, see **Step 7** in the heading **Generating Contract Billings**.

11 When ready, click the Update check box corresponding to each contract to renew. You can also click the Select All button to check all the contracts shown.

12 Click the Process button. After the procedure is complete, the pick tickets are generated, ending at a status 2, if you so specified. A record is added to the Z-RENEWALS file for each contract to be renewed.

13 To complete the renewal process, use the Update Renewals function. For details, see the heading **Updating Renewals**.

Note: In addition to entering meter readings, this window has been designed to let you perform a variety of useful functions, including saving and executing templates, viewing additional information, and printing the data shown. For details, see the heading **Additional Machine Billing Functions**.

Updating Renewals

After you generate the renewal pick tickets, you can use the Update Renewals process to update your renewals.

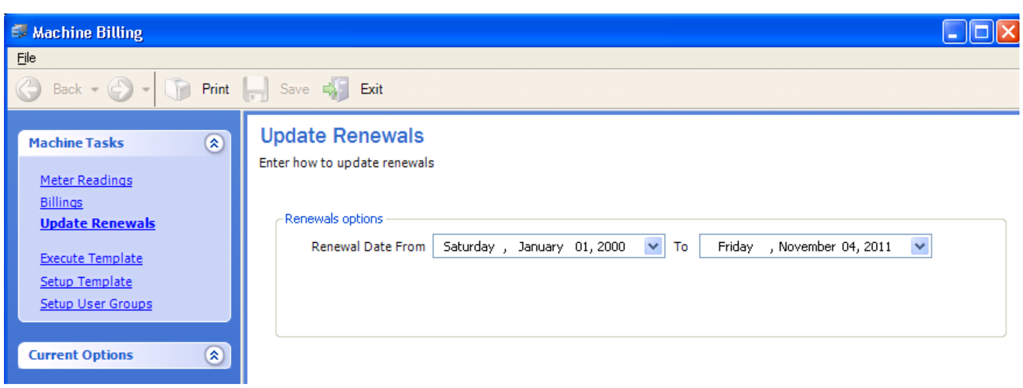
Note: If you set the Skip Check Of A/R When Renewing in EZU parameter in the (EZ1B) screen to Y, you can prevent the system from checking whether an invoice has been paid. If you do so, the line in the Updating Renewals window is set to red, indicating it has not been paid.

We recommend that you update records on a daily basis. Until you update the renewals, the customer's information does not reflect the new contract dates and contract totals.

1. In the Machine Billing window, under Machine Tasks, click Update Renewals.
2. Click the Renewal Date From/To boxes and enter the dates for which to update renewals. See Figure 10. You can also click the down arrow to select the date using a calendar.
3. When finished, click Next.
4. In the Available Limits section, set the limits for the renewals to include. For details, see the heading **Setting Limits**.
5. After setting limits, click Next.
6. The renewals that meet the limits you set appear. You can verify individual contract records, or you can process them in a batch.

   If you choose to verify individual contracts, you can change the terms of each contract and enter the beginning meter reading for renewed contracts that include meters. You can also renew individual contracts even if the renewal notice has not yet been paid. See Figure 11.

Figure 10: The Update Renewals Window



If you choose to process renewals in a batch, the system does not display the Contract/Meter Detail window to allow you to enter meter readings. However, the system does update the starting meter reading in the Machine Contract Detail window with the current meter reading. If you are renewing many contracts, processing them in a batch is a much faster procedure. When using this method, the system processes all the records at once.

To verify individual contracts, click the contract to verify, and click the Verify Contract link. The Contract/Meter Detail window opens so you can verify the contract record.

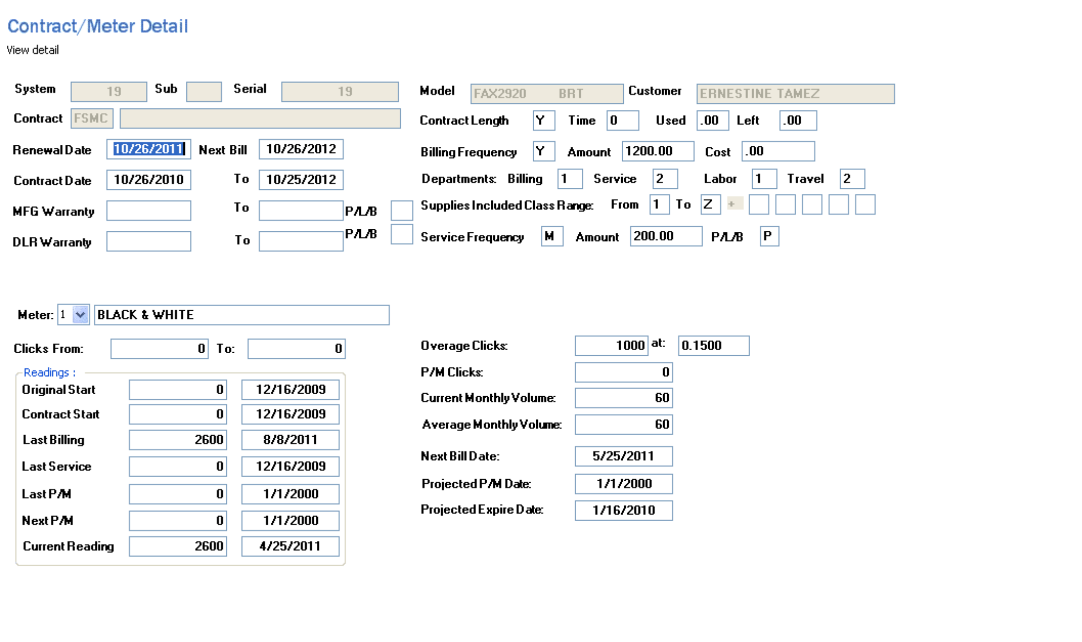
7 To export the information shown to a spreadsheet, such as Microsoft Excel, under the Current Options section, click Export Renewals. You can also right-click a contract and choose Export Renewals.

8 The Export Renewals dialog box opens. Click the Update Renewals File box and enter the path and file name in this box. You can also click the Browse button to search your hard drive and select the path and file to use.

9 Click Execute. See Figure 12. The data is exported to the path you specified.

10 When you're ready, click the Update check box corresponding to each renewal to update. You can also click the Select All button to check all the renewals shown.

Figure 11: Verifying Renewals



11 When you are ready, click the Save button.

Note: The contract information stored in the Z-RENEWALS file is deleted. If the Move EZJ History To EZK When Renewal Updated Through EZU field in the (EZ1B) screen is set to Y, the current contract history is moved from the Contract Detail History tab to the Renew History tab where it becomes extended contract history. The number of hits in the Contract Detail History tab is also increased by one. The Last Contract Invoice Amount box with the amount of the renewal invoice is also updated, along with the Next Bill box which lists the next billing date for the contract. Contract totals are cleared and replaced with the new figures from this renewal. If the Move EZJ History To EZK When Renewal Updated Through EZU field is set to N or left blank, the renewal process is completed when you perform the (MA) Daily Backup Procedure at the end of the day.

Setting Limits

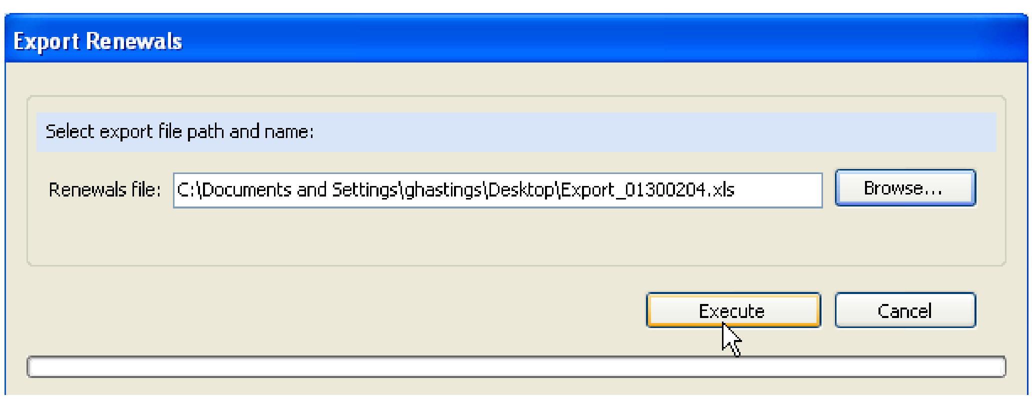
Whether you are entering meter readings, generating contract billings, or updating renewals, the limits shown in the Machine Billing window are the same. These limits let you define the information to view. For example, you could limit to a specific customer, salesperson, or machine. While several limits can be entered, the information must fall within every range to be included. Also, the more sorts and limits you set, the longer it takes to gather the information.

1 Click the + (plus sign) to the left of each option to view all the limit fields by which you can limit.

2 Click the field to highlight it. For example, to limit by System Number, click System Number.

3 In the Set Criteria for Selected Limit section, use the Compare, Range, and Exclusive boxes to set limits.

Figure 12: Exporting Renewals



- **Compare:** These boxes let you limit to values that are greater than, less than, or equal to the values specified. Suppose you need to include system numbers greater than 100. In this case, you would click the down arrow in the Compare box and choose > (greater than). In the corresponding box, you would type **100**. (You can also click to query.)

  Or, suppose the results should limit to a specific attention's name. In this case, you would set the Compare box to = (equals). In the corresponding box, type the attention's name, Tom, for example. When you add the limit, it appears in the Entered Limit Criteria box.

  The following table displays the Compare symbols available:

=	Equal to
<>	Not Equal
>	Greater than
>=	Greater than or Equal
<	Less than
<=	Less than or Equal
Like	Contains given characters (ex. Search for "smi" would return Smith, Smithfield, etc.)

- **Range:** These boxes let you enter a range of values by which to limit. Suppose the results should include system numbers from 100 through 200. You would enter 100 in the first box (the From box) and 200 in the corresponding To box. (You can also click to query, or when limiting by dates, you can click the down arrow to display a calendar.)
- **Exclusive:** This option applies when limiting to a Range. After entering the range, click Exclusive to limit by values outside the range you set.

4 After specifying each limit, click Add New. The limit you set appears in the Entered Limit Criteria box.

5 Continue to set as many limits as needed.

6 You can also remove limits.

To remove a single limit, click the limit to highlight it in the Entered Limit Criteria box. Click Remove Selected.

To remove all limits, click Clear All. The boxes are cleared so you can begin again.

Additional Machine Billing Functions

In addition to entering meter readings, this window has been designed to let you perform a variety of useful functions, including saving and executing templates, viewing additional information, and printing the data shown. For details, see the appropriate heading below .

Viewing Additional Information

1 After the results open, click a line to view additional information.

2 Once the line is selected, under Current Options, choose the option to view.

To view information in the Machine Detail window, click the View Machine Detail link.

To view information in the Contract Detail window, click the View Contract Meter Detail link.

To view call history, click the View Call History link.

To view additional meter information, in the bottom section of the window, double-click the meter to view. The Meter/Detail History window opens, shown in Figure 13. This information comes from the Machine Contract Detail Meter tab.

3 When finished viewing, close the windows.

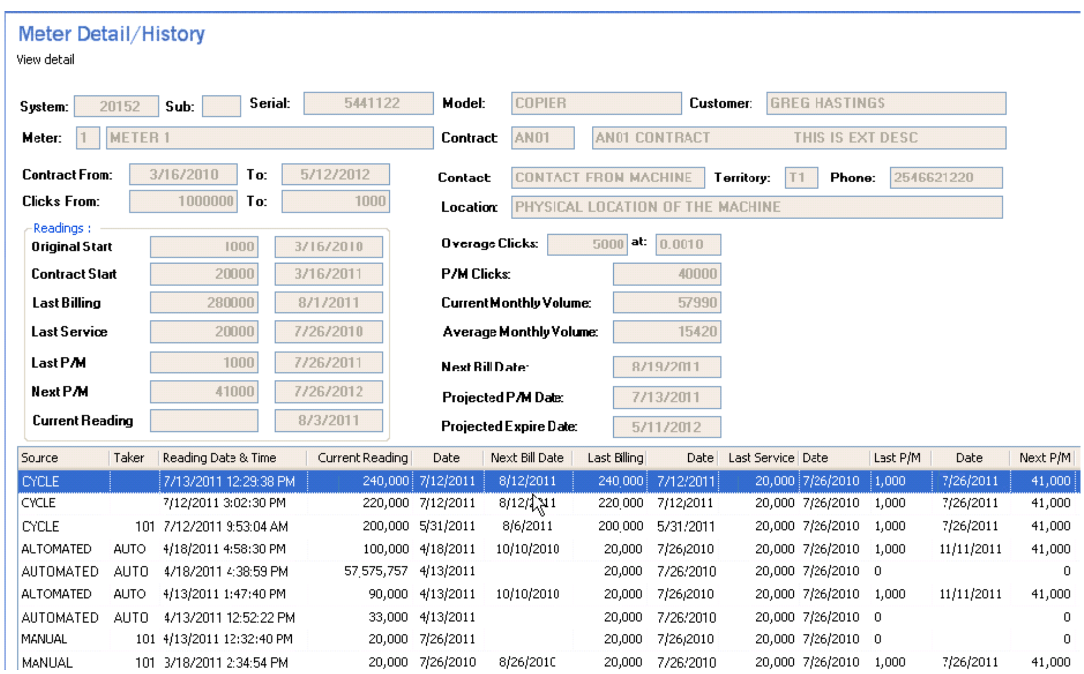


Figure 13: Verifying Meter History

Printing Information

1. To preview or print information, click Print .

2. The Print Preview dialog box opens. In this dialog box, you can view the information before you print it, print the report, or save the report to a file.

   - To print, click .
   - If you make changes to the information, click to apply the changes.
   - To export to a file, click . You can save the file as a pdf, htm, rtf, xls, or emf.

Saving as a Template

After you finish setting limits and the results open, you can save your changes as a template. The next time you access the window, click the template to view and click the Execute Template button.

1. In the Current Options section, click Save Template .
2. The Save Template dialog box opens, and the cursor moves to the Name box. Enter a name for this template.
3. In the Description box, enter a description.
4. Click the down arrow in the Group box and select the group to which to assign this template.
5. Click Save.

Note: If the template already exists with the same name and description, you are prompted to overwrite the old template. To do so, click OK. The information is saved.

Executing a Template

After you save information as a template, the template can be launched with just a few clicks.

Note: You can also set up templates and groups using the Setup Template and Setup User Groups functions. For further details, see **Setting Up Templates** and **Setting Up User Groups**.

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1. To select a template, click the + (plus sign) in the Group column to view the available templates.
2. Click the template name to highlight it.

3 You can click Execute to open the template or click Limit to set additional limits.

- To view the data without setting additional limits, click the Execute button.
- To open the data and set additional limits, click the Limit button. For details, see the heading **Setting Limits**.

Setting Up Templates

If you have several templates, it is helpful to organize and display them by user groups. New user groups can be added and removed. Templates can be saved, added to, moved, or removed from new or existing groups.

This security can be maintained for each individual user or group of users. Users can be assigned to specific templates individually or within groups. Users not assigned to an existing template do not have access to the template in the Template Selection list.

1 In the Machine Tasks section, click Setup Template.

2 The available options open in the Current Options section of the window. See Figure 14. You can perform each of the following functions:

- **Delete Selected Template:** To delete an existing template, click the template to highlight and click Delete Selected Template. At the Permanently Delete Template prompt, click Yes.
- **Move Template:** You can easily move an existing template from one user group to another. Click the template to highlight and

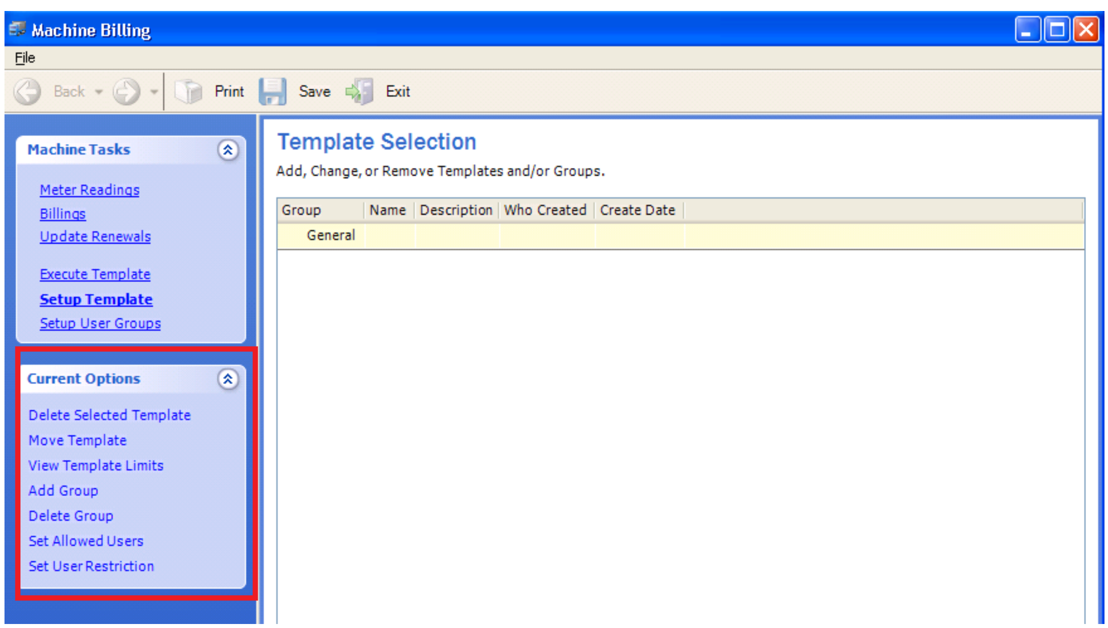

Figure 14: The Setup Template Current Options

click Move Template. When the Move Template dialog box opens, click the down arrow and select the group to which this template belongs. Click Apply.

- **View Template Limits:** To view all the limits you have saved for an existing template, click the template to highlight and click View Template Limits. The Current Template Limits dialog box opens, showing the limits you have set. When finished viewing, click OK.
- **Add Group:** This option lets you add a new template group name to the existing list. Click Add Group. In the Template Group Name dialog box, enter the name and click OK.

You can also highlight the group, right-click and select Delete Group.

- **Delete Group:** This option removes an existing template name and all its assigned templates. Click the template to highlight and click Delete Group. At the Remove Template Group prompt, click OK. The template name and all templates are removed from the template list.

You can also highlight the group, right-click and select Set Allowed Users.

- **Set Allowed Users:** This option lets you specify the allowed users for this template name. Click the template to highlight and click Set Allowed Users. Select the users and click OK.
- **Set User Restrictions:** This option lets you limit users to only their assigned templates. While restricted users can set additional view limits and save their template selections, they cannot remove the original template limits, nor can they add columns that do not exist in the original template. Instead, the system saves the original and additional limits as a new template with a different name and description. Along with the new template name, description, and creation date, the user’s number appears in the Who Created column in the Template Selection list. This helps quickly identify the user who added this new template.

. Click the group name or template and click Set User Restrictions. In the Set User Restrictions dialog box, click the name of the user to restrict. To select more than one, hold the Ctrl key and click each user’s name. When finished, click Apply.

Setting Up User Groups

You can set up user groups and assign individuals to that group. When you do, only templates to which this individual is a member can be viewed. If the individual is not a member of the group, the template is not shown in the user’s Template Selection list.

1 In the Machine Tasks section, click Setup User Groups.

2 The available options open in the Current Options section of the window. You can perform the following functions:

You can also highlight the group, right-click and select Remove Group.

- **Add Group:** This option lets you add a new group to the existing list. Click Add Group. In the Set User Group dialog box, enter the group name and description and click OK.
- **Remove Group:** This option removes an existing user group and all its assigned users, with one exception: the General Group cannot be deleted. Click the group to highlight and click Remove Group. At the Remove User Group prompt, click OK. The group and its users are removed from the list.

You can also highlight the group name, right-click, and select Add User.

- **Add User:** This option lets you add a new user to an existing user group. Click the group to highlight and click Add User. In the Select Users dialog box, click each user to add. The name is highlighted. To select more than one user, hold the Ctrl key and click each user's name. When finished selecting users, click OK.

You can also highlight the user, right-click and select Remove User.

- **Remove User:** This option lets you remove a user from an existing group list. Click the user's name to highlight and click Remove User. The user is immediately removed from the list of users within the group. The removed user cannot view the assigned templates in the group list.

Customizing the Grid

1 You can move columns of information from one area of the window to another. You can also remove columns of information to keep them from displaying in the window.

2 There are different ways you can customize the Machine Billing window.

- **Dragging and Dropping:** Click a column of information and drag it to a different area of the window. For example, to move the Model column before System #, click the Model column and drag it before the System # column.
- **Customizing the Grid:** Click the Customize Grid link. In the Grid Configuration Editor dialog box, you can drag columns of information from one area to another. You can also remove columns. To remove a displayed column, highlight it and right-click. Click Hide Column. For example, to remove the Loc column, click Loc to highlight it, right-click, and select Hide Column. The system displays a check mark, indicating the column is hidden. Click OK to close the dialog box. When you return to the Machine Billing window, the Loc column is no longer displayed. To replace a hidden column, click the Customize Grid link and click the Show

Hidden Columns check box to display all currently hidden columns. Click the column not displayed, and right-click. Click the Hide Column check box to de-select it. The check box is removed. An additional feature lets you click the down arrow in the Grid Options box to choose whether to display the line information in the grid using alternate colors. See Figure 15.

- **Sort the Data Again:** Click a column heading to resort the data. This lets you more easily find the information you need. For example, if you click the Total Cost column, you can sort by cost amount, from highest to lowest. If you click a date column, you can sort the data from the most recent date to the oldest date, and so on.

Figure 15: Customizing the Grid