

Introduction

When you conduct renewals and cycle billing procedures in ECi DDMS Machines & Equipment Edition, seven problems may occur on occasion:

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Your DDMS Technical Support Team has collected tips to help you troubleshoot these issues.

1. Machine not showing up during (EZY-B) Billing run

In Version 8.14 and higher, DDMS Machines & Equipment Edition gives you the ability to identify, log, and report on why a machine was not included during a billing run.

There are five reasons why a machine does not get billed according to billing limits set:

1. No contract billing frequency in the contract master record.
2. No contract dates in the contract master record.
3. No remaining billings for a lease.
4. No meter dollar amount for the meter (this includes either the per-click amount or minimum charge amount).
5. No meter reading in Z-M-BILL.

When you run (EZYB) billings, you will be prompted after entering all your limits and options, "Update Billing Exceptions? Print/Purge." This prompt applies to contract, lease and meter billings, but does not appear when running the To Be Billed report. It will print and/or purge the records added to the billing exceptions file during the specific run. The Billing Exceptions report will print to the same printer as the billing report.

In a new exception log file Z-BILLEXCP, the process of running billings in (EZYB) will log an exception for any machine that wasn't billed according to the limits set for billing. Each exception record in the Z-BILLEXCP file includes the date and time that the exception was logged during the EZYB Billing process, the ID of the contract that was not billed, and the exception reason the contract was not billed.

You also have a new option in the (EZY) screen to print the Billing Exceptions report, X=Billing Exceptions. You can limit to a location and billing date range, specify a printer and quantity of copies, and purge history.

Note: The Billing Date for this exception report is the date you ran the (EZYB) billing, which resulted in a billing exception record being added to the Billing Exceptions file.

Take corrective action depending on the exception reason. If the contract master record is missing information, update that contract's master record. If there are no remaining billings, check the dates in (EZJ) / Contract Detail. If the meter dollar amount is missing, correct it in (EZ_). If the meter reading is missing in Z-M-Bill, correct it in (EZV).

Please read on for more detailed troubleshooting instructions.

2. Meters not showing up in (EZV)

The Z-M-BILL file stores meter readings in the (EZV) Serial Meter Maintenance screen.

Usually, the Z-M-BILL file is only updated by your actions in the (EZV) screen. However two parameters allow other actions to update meter readings:

- The "Update meter bill file" parameter in (EZ1B) allows meter reading entries to update Z-M-BILL when logging a call or placing a work order.
- The Display Contract/Meter Information field in the (EZ1L) Serial Log In Parameters screen also affects Z-M-BILL. If you set this parameter to X, the Work Orders window prompts you to enter meter readings when you log a call. If you set the parameter to Y, the readings you enter when logging calls also update Z-M-BILL.

When performing the M=Meter Reading function in the (EZV) screen, the system compares the date provided in the upper-right hand corner of the screen against the meter billing frequency and the Last Meter Bill Date on the Contract Detail/Meter tab.

If the Next Meter Bill date exists in the Meter Tab of the Contract Detail, (EZV) will always use that date. Otherwise it uses the Last Bill Date and the meter billing Frequency. If a meter does not show up in (EZV), there are two possible reasons:

1. The meter frequency in the Meter Tab of Contract Detail is blank or has an invalid option.
2. The meter record has been deleted from the machine.

3. Can't get a contract to Renew in (EZU)

If the (EZU) Serial Contract Maintenance screen fails to renew a contract, try checking up to 12 details:

1. In Contract Detail/(EZI), if PERIOD is blank, then PERIOD must be specified by contract type in Contract Types/(EZ2)
2. In Machine Detail (Other Tab)/(EZG), check the UMBRELLA sytem number field. If a system number exists in the field, it must be valid, and you can not assign one umbrella record to another umbrella.
3. In Contract Detail/(EZI), check contract dates. Is it expired by date yet?
4. In (EZ1B) Serial Contract/Meter Billing Parameters for "Allow Renewing Expired Contracts In (EZU) If Auto-Renew Is Yes" should be "Y"
5. In Contract Detail/(EZI), if time block contract, check hours remaining. Is it empty or 0?
6. In Contract Detail/(EZI), AUTORENEW? must be set to Y to renew through (EZU).
7. In (EZ1S) the Use Projected Expiration Date field indicates whether the Contract Detail projected expiration date (Y) or the contract ending date (N) is used to determine when a contract renewal is due.
8. In Contract Detail/(EZJ), the RENEW field must be blank to auto-renew.
9. In Contract Detail/(EZJ), the Next Bill Date and contract expiration date should be the same.
10. In Contract Detail (Meter Tab)/(EZL) , check METER FROM/TO. Is it expired by copy count yet?

11. In Contract Types/(EZ4), verify that there are renewal parameters for the contract type the machine is under.
12. In (ZE2) make sure the record exists in Z-C-RENCAN.
13. In (ZE2) look for this machine in Z-RENEWALS. If it's in the file, it will not renew and will have to be (ZF6) deleted from the Z-RENEWALS.

4. *Can't get a contract to Update in (EZU)*

After running the (EZU-I) function to Invoice Renewals, the system creates a record in the Z-RENEWALS file of contracts waiting to be updated.

For the (EZU-U) Update Renewals function, the system uses the date you specify in the upper-right of the (EZU) as a cut-off, and matches on the contract renewal date.

If a contract still fails to update, there are four details to check:

1. In (EZJ) Contract Detail, the RENEW field must have a "Y" in it.
2. If (EZ1B) "Skip Check of A/R When Renewing In (EZU) is set to N, then the invoice will have to be paid before the system will allow you to update the contract.
3. In (ZE2), look in the Z-RENEWALS file to see if the system is in there.
 - If the system isn't found, then update the contract dates manually.
 - If the system is found, go to the next step.
4. Try doing (EZU-U) with a date of 99/99/99 in the upper-right corner.
 1. The cutoff date in the (EZU) screen must be greater than or equal to the contract renewal date in the Z-RENEWALS file. Print the file via System Utilities/(ZD2) to look for such records.
 2. Check (EZ1B) "Skip Check Of A/R When Renewing In EZU".
 - a. If set to N or blank, the system will look for the invoice# in AR-MASTER.
 - i. If it is not found, it will update the contract (assuming that the invoice had been paid and purged to JNL-AR).
 - ii. If the invoice is found, and has no balance, the contract is updated.
 - iii. If the invoice is found, but has a balance, the contract is not updated.
 - b. If the record in Z-RENEWALS has blank contract dates, it will not come up in (EZU).
 - i. Print the file via (ZD2) to look for such records.
 - ii. (ZF6) them from the Z-RENEWALS file.
 - iii. Then update contract dates and RENEW field manually.
 - c. If set to Y, the system updates the contract based on the cutoff date used in the (EZU) vs the renew date of the contract.

5. *Can't get contract renewals to consolidate in (EZU)*

If you are answering Y to the Consolidate prompt (which means you want ONE invoice per CUSTOMER instead of ONE invoice per MACHINE), and it is not working, you must check the machines to see if they are assigned to departments under that customer's account in the Serial Master.

If so, you must go to Customers (Machine Tab)/(EZA) and set the Consolidate field to Y. This will Consolidate across all departments for the customer. Your support team recommends setting it for the master account and perhaps all departments.

6. Can't get a contract or meter to bill in (EZY)

If the (EZY) Maintenance Report Selection screen fails to bill the contract or meter, try checking up to 13 details:

1. If limiting to location in (EZY), check the location in Machine Detail./(EZG)
2. If it is an umbrella contract and they are trying to bill the meter, you can't limit in (EZY) to the system#. Instead you can limit to Customer# and Contract Type.
 - Make sure the umbrella system# is not pointed at another umbrella contract in Machine Detail./(EZG).
3. In Contract Detail/(EZI), check the contract dates. Is it expired by date?
 - If (EZ1B) "Skip Check of A/R When Renewing In EZU is set to N, then the invoice will have to be paid before the system will allow you to bill for next month. If the contract has been renewed, but if the renewal invoice is still outstanding, the system treats the contract as expired.
4. In Contract Detail/(EZI), if it's a time block contract, check hours remaining. Is it empty or 0?
5. In Contract Detail/(EZI), what is the billing frequency and rate?
6. In Contract Detail (Meter Tab)/(EZL), check METER FROM/TO. Is it expired by copy count?
7. In Contract Detail/(EZI), the AUTORENEW? Field must be set to X to renew through (EZY).
8. In Contract Detail/(EZI), the RENEW field must be blank.
9. In Contract Detail/(EZI), what is the next bill date?
10. In Contract Detail (Meter Tab)/(EZL), what is the billing frequency and next bill date? Is there an overage amount?
11. In (EZV), does the meter have a current reading on file?
12. In Contract Detail/(EZI), if PERIOD is blank, then PERIOD must be specified by contract type in (EZ2).
13. In (EZ1B), if "Skip Check of A/R When Renewing In (EZU) is set to N then invoice will have to be paid before system will allow you to bill for next month

7. Meter billing on Umbrella contract not posting to sales on GL-BATCH

(EZG) / Machine Detail (Other Tab) check to see if an umbrella system# is assigned, and that the umbrella number exists as well.

Note: You can not assign an umbrella to another umbrella.