TaiRox Productivity Tools User Guide

Summary – Mass Billing

Mass Billing extends the functionality of Sage 300 Accounts Receivable by creating a large number of invoices or credit notes for a set of customers quickly and easily. This product is targeted at companies or educational institutions that administer a lot of fees to ranges of customers. In an educational environment, students are set up as customers with optional fields ("grade"). Mass Billing facilitates the administration of fees such as yearly-book fees or field-trip fees that may apply to some or all grades.

Overview – Mass Billing

Mass Billing creates an A/R invoice batch containing one invoice line per customer (or one credit note per customer if the Item Price has a negative value). The charge relates to an A/R Item's price, which can be overridden. A currency is specified. Invoices will only be produced for customers with that currency.

Running Mass Billing

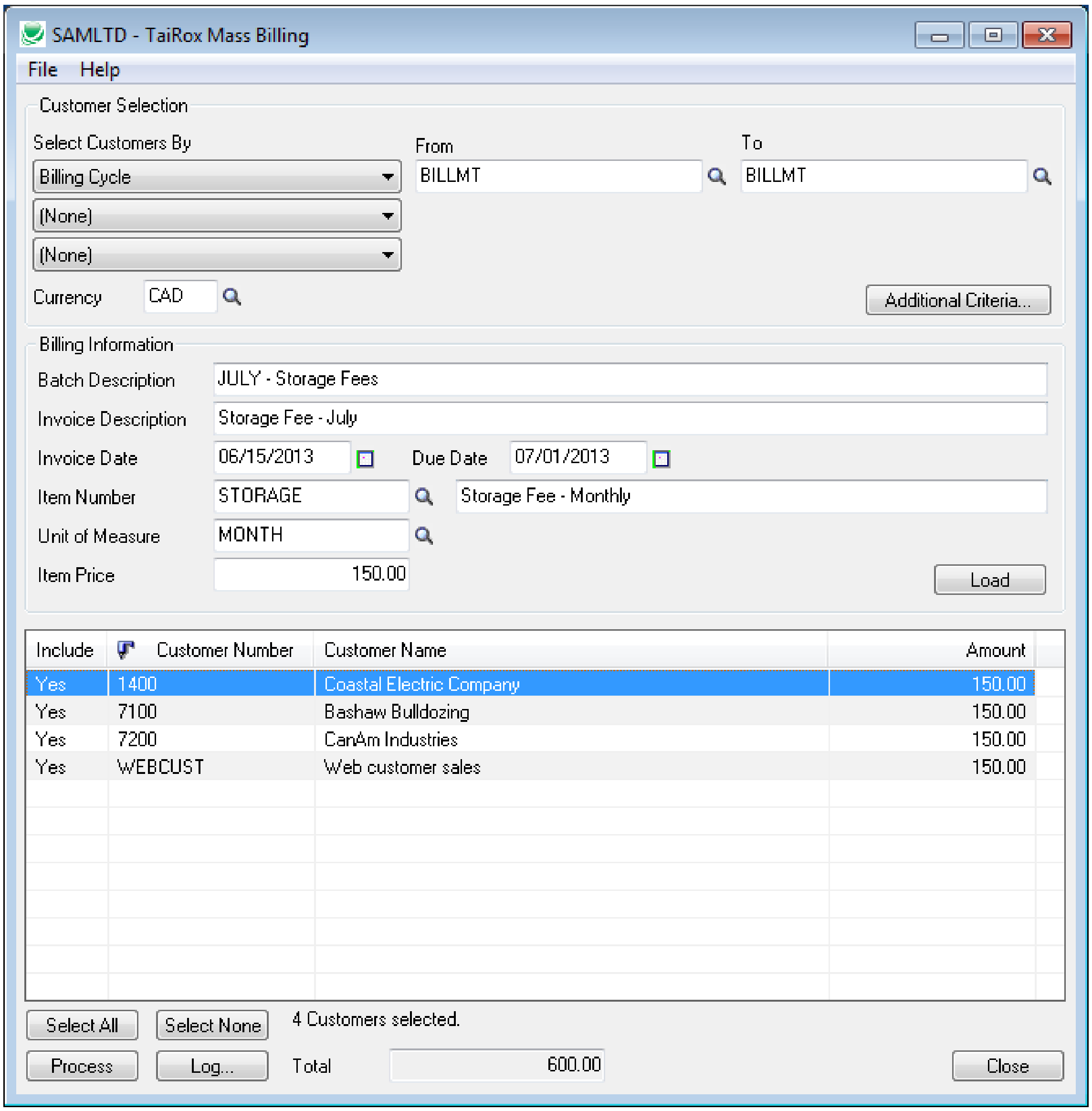
Once the TaiRox Productivity Tools are installed and activated, the Mass Billing icon will be shown on the TaiRox Productivity Tools menu on the Sage 300 desktop (and can be copied to other menu locations).

Running Mass Billing (continued)

When Mass Billing is launched a window will appear. Enter the criteria used to select customers. Note that inactive customers will be excluded and that the customer's currency must match that specified.

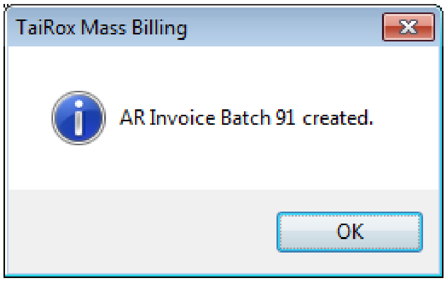
Enter A/R Batch details and click the **Load** button display all customers satisfying the selection criteria. The Amount fields will default to the value you entered in the Item Price field. Double-click the Include column to cherry-pick the customers.

After the billing information has been entered and the desired customers selected create the AR Invoice batch by clicking on the **Process** button.



Running Mass Billing (continued)

When the program is finished creating the invoice batch it will display a message identifying the batch that was created.



Log Files

The program keeps a separate log file for each date. If the program is run more than once on the same date then the log entries are appended to the log.

You can view the log file for the current date by clicking on the Log button. You can view other logs (as well as the current date's) by clicking on the File→Log Files menu choice.

Note that the log files are located in the folder where the program was installed and can be viewed or edited using any program capable of reading a text file (Microsoft Word for example).