We improved the "Generate Debit Batches" screen and the "Monthly Processing" screen to have the same look and feel as the rest of the system.

This has been released in v.1.3.03

Webinar: **Month-end Billing Run**

Video: **Billing Run (Part 1)**
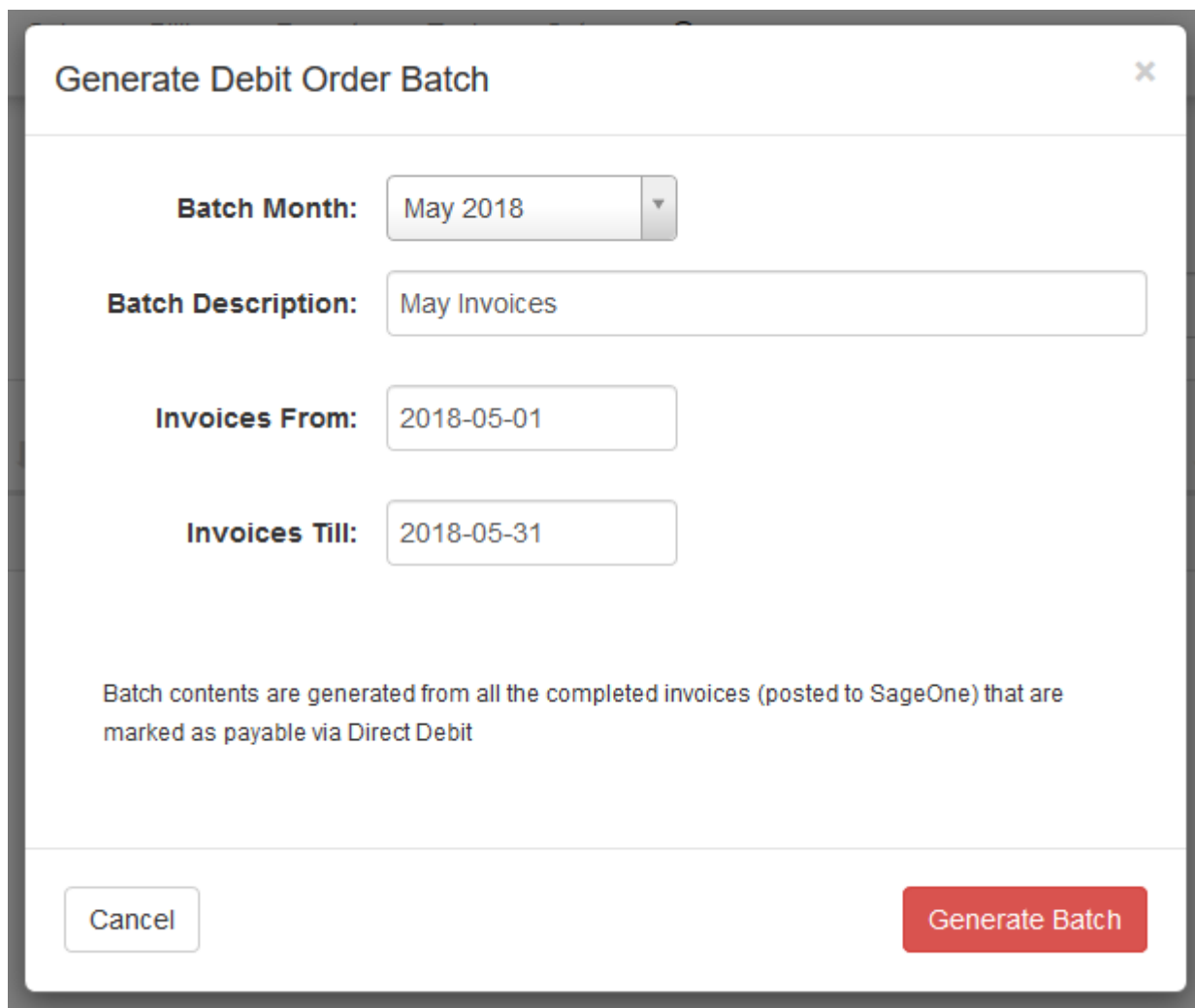
Video: **Billing Run (Part 2)**

Monthly Processing screen changes:

- Force date fields to be read-only on screen – with the only modifiable field being the Billing Period. Like in the Billing Settings themselves – date fields will change based on this range.
- Confirming a billing period will automatically save the current billing settings noted on the screen – that way a person getting ready to process a new month won't need to update the billing settings first. This makes the UI more forgiving and intuitive in terms of workflow.
- Change user permissions for this screen to be inline with permissions to change the identical date fields under the billing settings screen.

Generate Debit Batch screen changes:

- Created a popup screen to generate debit order batches. Functionality remains identical as before.
- On the list screen, the Month drop-down now becomes a filter for the Debit Order List table.
- On page load, the Table will default to only showing the latest debit order period entries.
- Historical batches (ones which have an ending invoice date earlier than the current date) will be unmodifiable and unremovable.

When you go to **Billing** –> **Debit Run Batches** –> **Generate Debit Batch**, and you click on the "**Generate Debit Batch**" button, you will now see the new "**Generate Debit Order Batch**" popup screen:

Old screen design of "**Generate Debit Batches**" screen: (previously had not pop-up screen)

Generate Debit Batches

| May 2018 ▼ | Batch Description | Invoices From | Invoices Till | Generating... ⟳ | Refresh |

Batch contents are generated from all the completed invoices (posted to SageOne) that are marked as payable vie Direct Debit

- Description cannot be blank
- From Date cannot be blank
- To Date cannot be blank

| 500 ▼ records per page | | Search: | Copy Columns Clipboard | Export Columns CSV | Export Columns Excel | Show / Hide Columns |

Month	Date From	Date To	Batch Description	Batch Breakdown	Number Customers	Batch Total	
2018-04-01	2018-04-01	2018-04-30	april 2018	⬇ R 24,437.50 on 2018-05-01	5	R 24,437.50	⚙ ✖

Showing 1 to 1 of 1 entries

Previous | 1 | Next