

# Overwriting recurring billing entries

HeroTill now allows for recurring billing entries to be overwritten or removed from customer profiles. This will mostly be used in the case that you quickly need to do a bulk price change for specific non-data recurring billing items i.e. VoIP, hosting etc.

It is important to remember that when you import this CSV template, that the system will look for all recurring billing entries that have the same name and product combo as in your recurring billing. In other words, when you say “Johnny (JOH001), Hardware”, it will delete all recurring entries for Johnny’s hardware purchases – regardless of the prices, dates and quantities.

**Please be diligent when completing this process as once you have overwritten a recurring billing entry, the old entry will be deleted. This process cannot be undone and it is advised that you use this functionality with extreme care.**

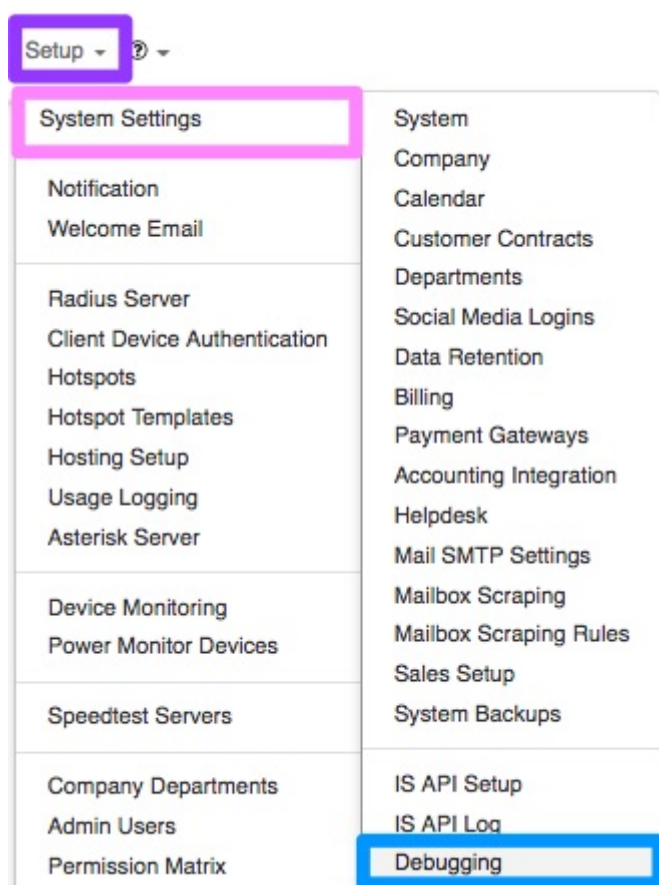
## 1.1. Permissions needed:

All admin users with the following permissions will be able to enable or overwrite and delete recurring billing entries:

Permission	Read	Write
System	X	X
General Manager	X	X

## 1.2. How to enable the import tool:

To enable this function, you will need to go to “**Setup**” - “**System Settings**” and then click on the “**Debugging**” option.



Scroll down until you reach the “**Show Overwrite Recurring Billing Tool**” option and switch the toggle button to “**Yes**”. Remember to click on the “**Update**” button after making any changes.



Show Overwrite Recurring Billing Tool ☒ Yes

Default Migration Customer

Default Migration Product

All debug data is inserted into the tmp\_table db table

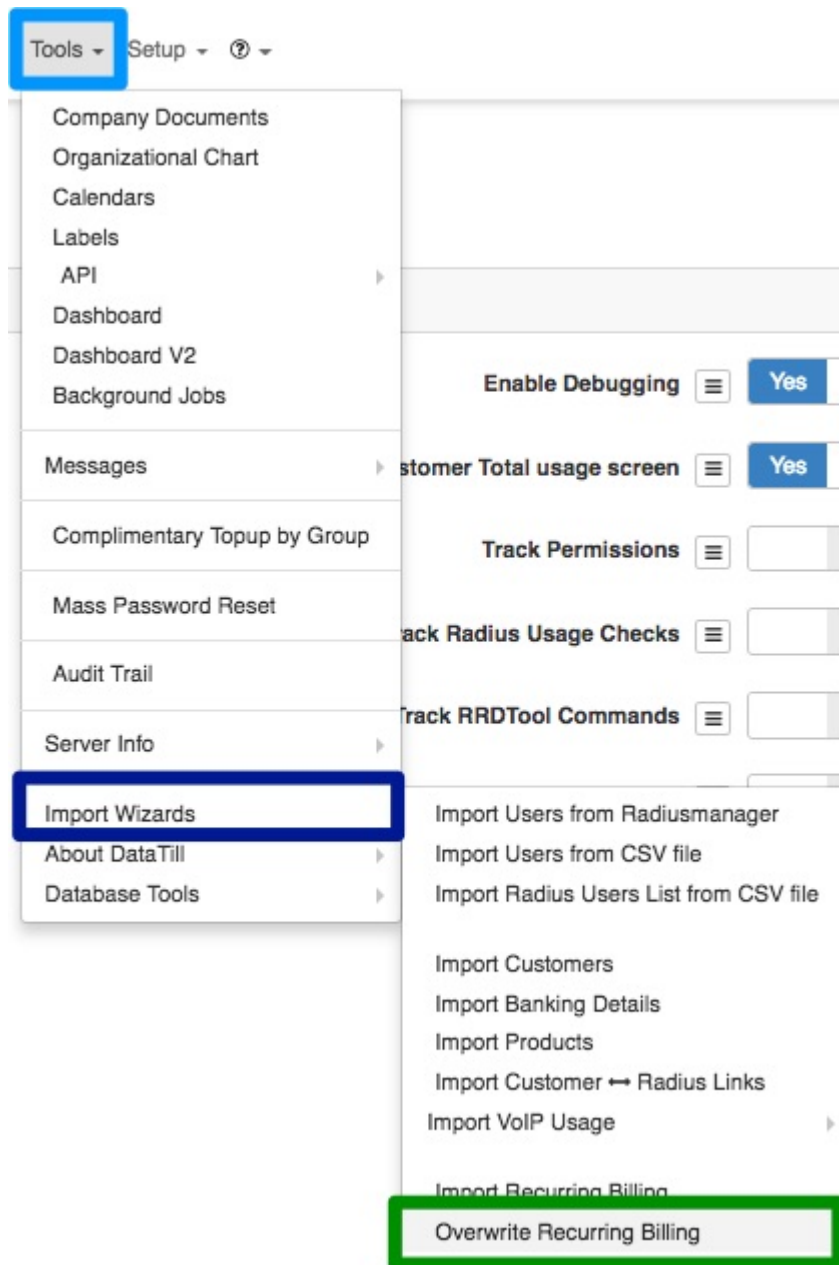
Show Data Protection ☒ Yes

Queue Topup Disconnects ☒ Yes

Enable Maintenance Controller ☒ Yes

Update

After you have enabled this option, go to “**Tools**” - “**Import Wizard**” and then click on the “**Overwrite Recurring Billing**” option.



You will now see the following screen:

Overwrite Recurring Billing

Step 1 of 3

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### Step 1

#### Introduction

This Wizard allows you to **overwrite** recurring billing information from a **csv** file.

The csv file should contain the following information in this specific order:

- Customer Account Code \*
- Product Code \*
- Recurring Description \*
- Recurring Cost \*
- Interval \*
- Start Date \*
- End Date \*

\* Required Fields

[Download Sample File](#)

Please note:

- The first row will be ignored
- Old recurring billing entries will be deleted
- New recurring billing entries will be created
- There should be no duplicate lines in the CSV

If you would like us to generate a CSV for you, please click here:

[Generate CSV](#)

## Step 1: Introduction

In your introduction, you will be able to see the following information:

## Step 1


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If you would like us to generate a CSV for you, please click here:

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You will have one of two options when you are overwriting recurring billing entries:

- Purple:** This will allow you to create your own import template.
- Blue:** This button will allow you to extract a list of specific non-data recurring.

**Please note:**

- The first row will be ignored.
- **Old recurring billing entries will be deleted.**
- New recurring billing entries will be created.
- **There should be no duplicate lines in the CSV document.**

### **1.1. Creating your own templates:**

To populate the import template with your own information, click on the “**Download Sample File**” button to download the import template.




#### File Upload

The csv file should contain the following information in this specific order:

- Customer Account Code \*
- Product Code \*
- Recurring Description \*
- Recurring Cost \*
- Interval \* (Monthly, Yearly)
- Start Date \*
- End Date (Leave blank for indefinite billing)

\* Required Fields

 Download Sample File

After the template has downloaded, click the downloaded document to open it.

A	B	C	D	E	F	G
Account Code	Product Code	Recurring Description	Recurring Cost	Interval	Start Date	End Date

After populating your document, save it as in CSV format and then continue to step 2 of the process.

## 1.2. Overwriting only specific items

You will also have the option to export and override only specific non-data recurring billing items. To do this, you will need to click on the “**Generate CSV**” button.

Please note:

- The first row will be ignored
- **Old recurring billing entries will be deleted**
- **New recurring billing entries will be created**
- There should be no duplicate lines in the CSV

If you would like us to generate a CSV for you, please click here:

 **Generate CSV**

After clicking on the “**Generate CSV**” button, you will be redirected to the following screen:

Generate a Recurring Billing Overwrite CSV

The generated CSV is in a suitable format for use in [Overwrite Recurring Billing](#)

1. Choose a non-data Product **Type**

2. Choose a Product **Code**

3. Click “Generate CSV” and then “Download”

4. Open the CSV in a CSV editor of your choice (e.g. Microsoft Excel)

5. Change the Amount (price) and save your new CSV

6. Upload the new CSV to [Overwrite Recurring Billing](#)

Please note:

- The available Product Codes are for **non-data products** only
- The Generated CSV is intended for use with **Overwrite Recurring Billing** only

Product Type

asda

Product Code

NO PRODUCTS FOUND

Generate CSV

Choose the relevant “**Product Type**” and then the specific “**Product Code**” that you would like to overwrite. After choosing the relevant product type and code, click on the “**Generate CSV**” button. If there are no products for the specific product type, then the product code section will display “**NO PRODUCTS FOUND**” as in the screenshot above.

Once the CSV file has generated, then you will be able to **download** the CSV document.

When you open this CSV, all the relevant information will already be populated with a list of the relevant customer codes and other information. You will now just be able to change the relevant section. Remember to save your document as a CSV document and then you can

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continue to step 2 of this process.

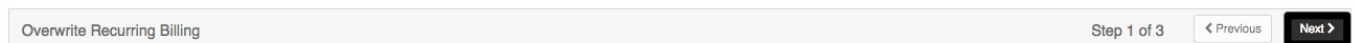
**\*Please Note: End Date**

If there should be no end date linked to the product, please ensure that the field is **empty**.  
If there should be an end date, please ensure that the correct end date has been entered.

**Remember to double check that there are no duplicate entries in your document.**

## Step 2: File upload and validation

After you have built your import template or made your changes, you need to upload your document and validate the file. To do this, go to the import tool and click on the **“Next”** button.

A screenshot of a web interface titled "Overwrite Recurring Billing". On the right side, it says "Step 1 of 3". Below this, there are two buttons: a light gray button with a left arrow and the text "Previous", and a dark gray button with the text "Next" and a right arrow.

Step 1

On the next screen, you will need to **“Upload CSV Filename”** and then click on the **“Validate File”** button.

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## Step 2

### File Upload

The csv file should contain the following information in this specific order:

- Customer Account Code \*
- Product Code \*
- Recurring Description \*
- Recurring Cost \*
- Interval (Monthly,Yearly)
- Start Date \*
- End Date (Leave blank for indefinite billing)

\* Required Fields

Download Sample File

Please note:

Upload CSV Filename
Choose file | No file chosen

Existing CSV Filename

import\_recurring\_billing (1).csv, 267.0 B

Field Delimiter

,

Field Enclosure

"

Total Number of Rows

4

Number of Invalid Rows

Show File Contents

At the bottom of the screen, you will now see whether all lines are validated or not. If the lines are not validated, they will be displayed in red. Fix the unvalidated lines first before continuing to the next step. If the lines are validated, they will be displayed in green (as seen below) and you can continue to step 3.

Account Code	Product Code	Recurring Description	Recurring Cost	Quantity	Interval	Start Date	End Date
MIC001	10Mbps	10Mbps capped	200	2	Monthly	2016-06-01	
MIC001	8M-LNC	8Mbps Uncapped	1299	3	Yearly	2016-06-01	
BES001	Test001	Test001 title	100	15	Monthly	2016-06-01	

## Step 3: Overwrite

To continue to the next step, click on the “**Next>**” button found in the top right-hand corner.

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## Step 2

On the following screen, you will either be able to delete the selected recurring billing items

from customer profiles or you will be able to delete the selected recurring billing items and overwrite it with new ones.

Overwrite Recurring Billing

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Step 3

Recurring Billing Overwrite

CSV Filename

import\_recurring\_billing (1).csv

Total Number of Rows

4

Number of Invalid Rows

0

Delete Imported Rows

Delete Imported Rows and Overwrite

### 3.1. Deleting recurring billing entries

To only **DELETE** recurring billing items, please click on the “**Delete Imported Rows**” button. You will now see the following pop-up screen:

Delete matching recurring\_billings

Please Confirm: You are about to delete the recurring billing entries that match the imported file: 'import\_recurring\_billing (1).csv'

Please Note: A recurring billing is considered a match when the **Customer Account Code** and **Product Code** in the CSV are the same as the existing **Customer Account Code** and **Product Code** in the system.

Cancel

Delete Now

Click on the “**Delete Now**” button to continue. Please note that this will not overwrite old entries with new information, but simply delete the recurring billing items. Once all items have been deleted and overwritten, you will see the following pop-up screen.

## Delete Complete



All Matching recurring\_billings have been deleted

BES001 Test001		- Deleted
MIC001 8M-UNC		- Deleted
MIC001 10MBPS		- Deleted

### 3.2. Overwriting recurring billing entries

To **DELETE and OVERWRITE** recurring billing entries, please click on the “**Delete Imported Rows and Overwrite**” button. You will now see the following pop-up screen:

Overwrite recurring\_billing records

Please Confirm: You are about to **overwrite** the recurring billing entries that match the imported file.

Please Note: A recurring billing is considered a match when the **Customer Account Code** and **Product Code** in the CSV are the same as the existing **Customer Account Code** and **Product Code** in the system.

Cancel

Import Now



Click on the “**Import Now**” button to continue. Please note that this will delete the recurring billing entries as well as replace them with new ones. Once all items have been deleted and overwritten, you will see the following pop-up screen. You will be able to see all the items that have been deleted and overridden.

## Overwrite Complete ×

All Matching recurring\_billings have been overwritten

BES001 Test001	✓	- Deleted
BES001 Test001	✓	- recurring billing added
MIC001 8M-UNC	✓	- Deleted
MIC001 8M-UNC	✓	- recurring billing added
MIC001 10MBPS	✓	- Deleted
MIC001 10MBPS	✓	- recurring billing added