



Create Billing Codes

In Equitrac

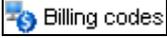
Instructor Led Training
Chapter 3 – Exercise D

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Create a Billing Code

NOTE: In order to be able to complete future exercises, please use the information provided below exactly as shown; do not make any substitutions or skip any of the entries.

1. Start **Equitrac System Manager** and connect to the accounting server.
2. In the left pane, click .
3. In the right pane, right-click in the white area, and then click **Add billing code**.

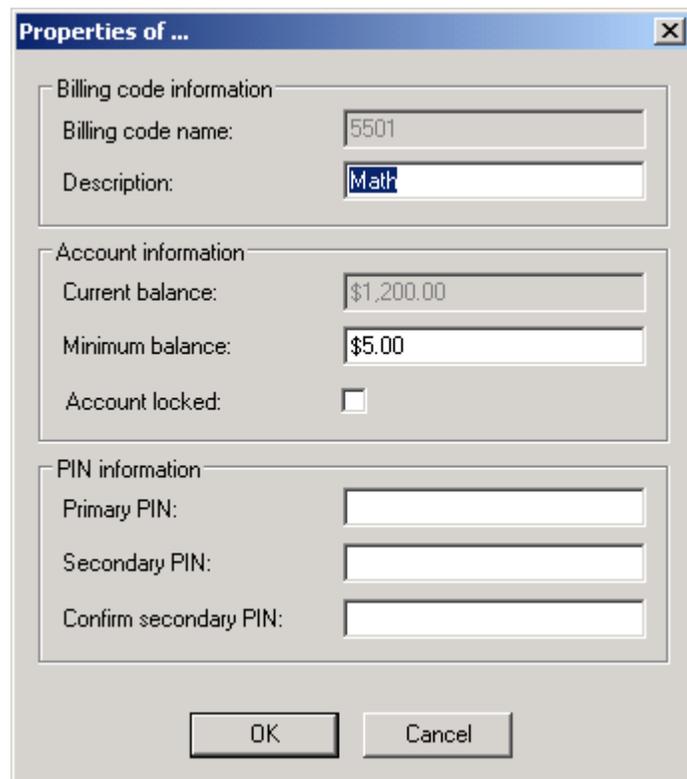
4. In the Add Billing Code dialog box, type the following information:

Billing code name: **5501**
Description: **Math**
Current balance: **1200**

5. Click the  button to create the billing code.

6. Create another billing code with the following information:

Billing code name: **5502**
Description: **Science**
Current balance: **800**



Properties of ...

Billing code information

Billing code name: 5501

Description: Math

Account information

Current balance: \$1,200.00

Minimum balance: \$5.00

Account locked:

PIN information

Primary PIN:

Secondary PIN:

Confirm secondary PIN:

OK Cancel

Use a Script to Create Additional Equitrac Billing Codes

1. Click  then select Run.
2. Type **cmd** then press the  key.



Open: cmd

EE-EO

3. In the DOS window, type the following:

D: and press the  key

CD\bat and press the  key

Users [Server Name] and press the  key

where [Server Name] = the name of the accounting server



```

C:\WINDOWS\system32\cmd.exe
C:\Users\dshea>d:
D:\>cd\bat
D:\Bat>Users EqServerXX
    
```

As each billing code is successfully added to the database, the line “ADD command processed successfully” appears in the window. If the record already exists in the database, an error message is returned, and the entry is skipped.

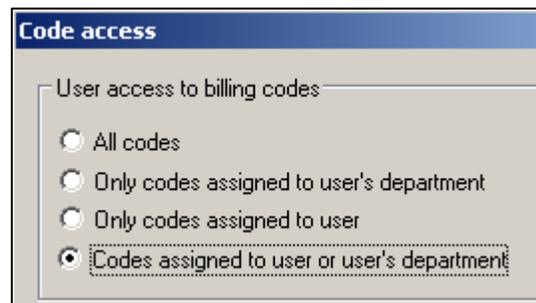
4. When the process is complete, type **Exit**, and then press the  key to close the DOS window.

5. Start **Equitrac System Manager** and review the list of billing codes; 9 billing codes should appear. If Equitrac System Manager is already running, press the  **Refresh** button.

NOTE: The syntax of the batch file to add multiple billing codes is as follows:
add bc (bc_name) [(init_bal) (desc) (min_bal) (PrimaryPIN) (SecondaryPIN)]

Enable How Billing Codes Are to Be Used

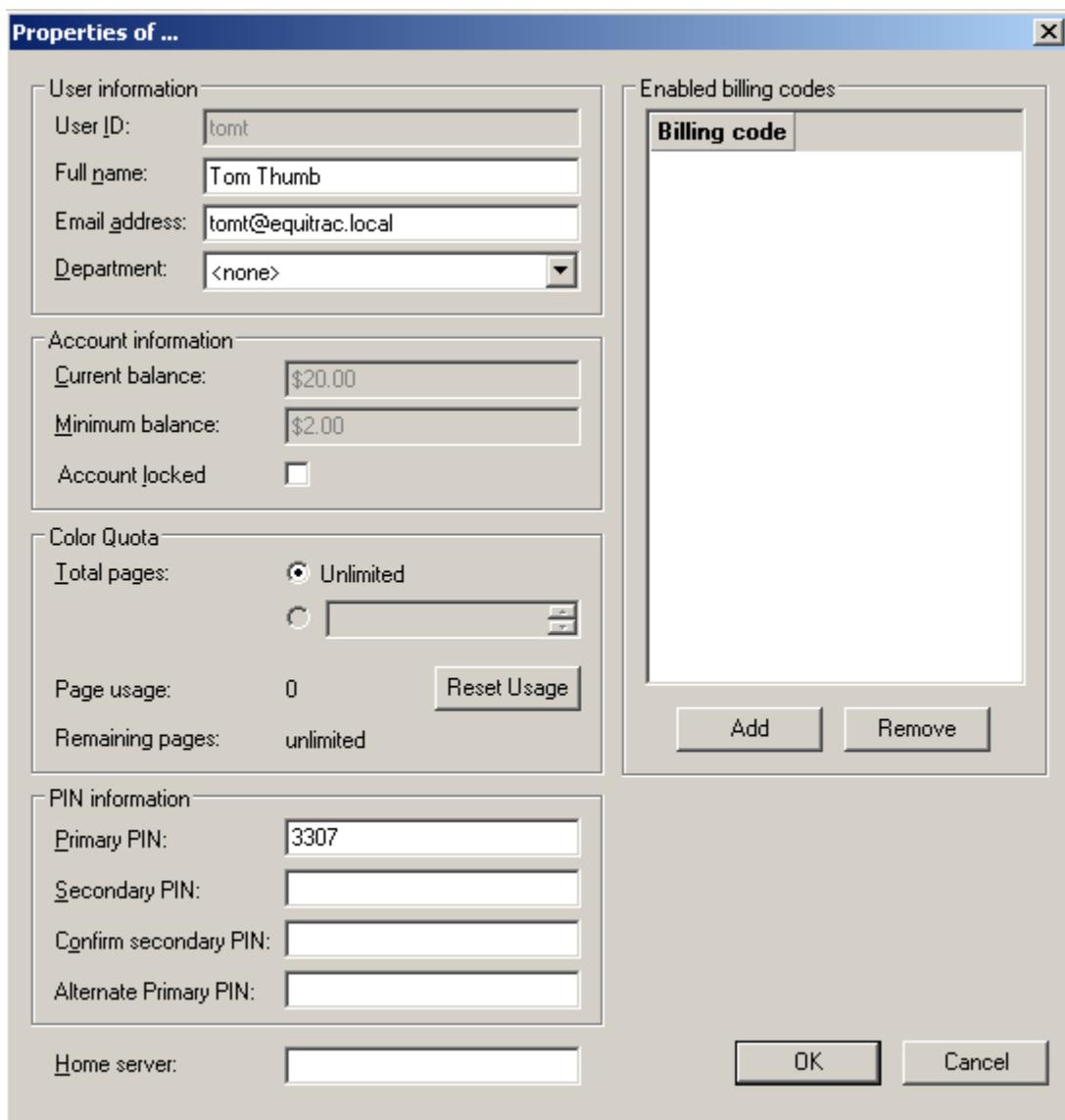
1. In **Equitrac System Manager**, click  **Configuration** in the left pane.
2. In the **Billing codes** section in the right pane, click **Code access**.
3. Click the **Codes assigned to user or user’s department** radio button; this enables the Billing Codes section in the Properties dialog box of a user.



Assign a Billing Code to a User

NOTE: A user can be assigned multiple billing codes.

1. In **Equitrac System Manager**, click  **Users** in the left pane; the list of users appears in the right pane.
2. In the right-pane, click the User ID column heading to sort the list in ascending order by User ID.
3. Click the user ID **tinyt**; the Properties of... dialog box appears with the **Enabled billing codes** section visible.



Properties of ...

User information
User ID: tomt
Full name: Tom Thumb
Email address: tomt@equitrac.local
Department: <none>

Account information
Current balance: \$20.00
Minimum balance: \$2.00
Account locked:

Color Quota
Total pages: Unlimited

Page usage: 0
Remaining pages: unlimited

PIN information
Primary PIN: 3307
Secondary PIN:
Confirm secondary PIN:
Alternate Primary PIN:
Home server:

Enabled billing codes
Billing code

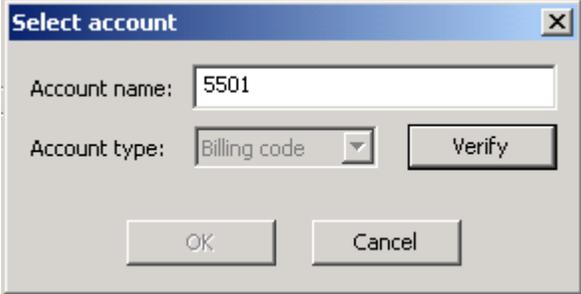
NOTE: If the Billing Codes section is not visible, close the Properties dialog box, click the



button, and reopen the dialog box.

4. Click the  button.

5. In the **Account name** field; type **5501** and then click the  button.

A dialog box titled "Select account" with a close button (X) in the top right corner. It contains two input fields: "Account name:" with the text "5501" entered, and "Account type:" with a dropdown menu showing "Billing code". To the right of the "Account type:" field is a "Verify" button. At the bottom of the dialog box are two buttons: "OK" and "Cancel".

6. If the entry is invalid, an error message appears.



7. Click the  button to acknowledge the error message.

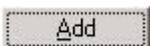
8. Re-enter the account name and click the  button again.

9. If the entry is valid, the  button becomes available.

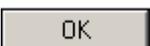
10. Click the  button when it becomes available.

11. When you have finished assigning bilcing Codes for the user, click the  button to close the Properties of dialog box.

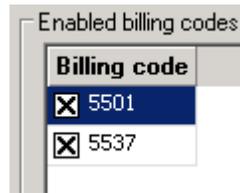
12. Click the user ID **tinyt**; the Properties of... dialog box appears and billing code **5501** appears on the list.

13. Click the  button.

14. In the **Account name** field; type **5537** and then click the  button.

15. Click the  button to close the Properties of dialog box.

16. Click the user ID **tinyt**; the Properties of... dialog box appears and billing codes **5501** and **5537** appears on the list.



Unassign a Billing Code from a User

1. In **Equitrac System Manager**, click  **Users** in the left pane; the list of users appears in the right pane.
2. In the right-pane, click the User ID column heading to sort the list in ascending order by User ID.
3. Click the user ID **tinyt**; the Properties of... dialog box appears.
4. Click the **X** beside **5537**; the **X** disappears, but the entry remains on the list.
5. Click the  button to close the Properties of dialog box.
6. Click the user ID **tinyt**; the Properties of... dialog box appears, and billing code **5537** has been removed from the list.

To select multiple, non-sequential billing codes, left-click the first billing code, press and hold down the  key, and then left-click each additional billing code; each selected billing code remains highlighted as the next billing code is selected. To select a range of consecutive billing codes, left-click the first billing code in the range, press and hold down the  key, and then left-click the last billing code in the range; all billing codes in the range become highlighted. You must click the  button to close the Properties dialog box before any changes (additions or removals) are applied to the user account.

Copy and Paste Billing Codes to a User or Multiple Users

In an organization, it is often the case that multiple users need to be assigned the same group of billing codes. To assign a set of billing codes to each user can be a time consuming process. Equitrac has an option that allows you to assign the billing codes to the first user and then copy them to subsequent users.

WARNING: When pasting billing codes, if the recipient user has any billing codes already assigned, the existing billing codes are overwritten with the copied billing codes; the paste does not append the new billing codes to the existing list.

1. In **Equitrac System Manager**, click  in the left pane; the list of users appears in the right pane.
2. In the right-pane, click the User ID column heading to sort the list in ascending order by User ID.
3. In the right pane, click the user ID **tomt**; the Properties of... dialog box appears.
4. Add the billing codes **5537**, **5538** and **5539**.
5. Click the  button to close the Properties of dialog box.
6. Click the user ID **tomt**; the Properties of... dialog box appears, and the three billing code appear on the list.
7. Close the Properties dialog box.
8. Right-click the user ID **tomt** and click **Copy billing codes**.
9. Right-click the user ID **drs** and then click **Paste billing codes**; a message box appears indicating which accounts were copied.
10. Click the  button to acknowledge the message.
11. Click the user ID **drs**; the copied billing codes appear.

NOTE: Multiple users can be selected before initiating the **Paste** process. Each user is assigned the same set of billing codes.

HINT: To remove **all** the billing codes assigned to a user or group of users, **copy** the billing codes from a user with NO billing codes assigned and **paste** to a user or group of users you want to remove all billing codes from. Since the paste operation **overwrites** all existing codes, the net result of pasting an empty set of billing codes is the same as manually deleting each code from each user.

Assign a Billing Code to a Department

1. In **Equitrac System Manger**, click  in the left pane; the list of users appears in the right pane.
2. In the right-pane, click the User ID column heading to sort the list in ascending order by User ID.
3. In the right pane, click **Administrator**; the Properties dialog box appears.
4. Click the  button.
5. In the **Account name** field; type **5501** and then click the  button.
6. When the  button becomes available, click it.

7. Close and then reopen the Properties dialog box of the Administrator department; the billing code **5501** appears.

Unassign a Billing Code from a Department

1. In **Equitrac System Manger**, click  in the left pane.
2. In the right-pane, click the User ID column heading to sort the list in ascending order by User ID.
3. In the right pane, click **Administrator**; the Properties dialog box appears with the billing code **5501** assigned.
4. Click the box beside **5501** or highlight the billing code and then click the  button; the **X** beside the entry disappears.
5. Click the  button to close the Properties dialog box and assign the new billing code.

NOTE: Similar to assigning billing codes to a user, you can use the  click or  click key sequences to highlight each entry and then click the  button. You cannot manually remove the **X** when multiple billing codes are highlighted. Further, if you unassign the wrong billing code, click the empty box beside the billing code; the **X** reappears.

Copy and Paste Billing Codes to a Department or Multiple Departments

The Copy-and-Paste functionality is also available with Departments. You can copy the billing codes assigned to a single department to another department or multiple departments. You can also use the method to remove all billing codes assigned to a department or group of departments.

Refer to the **Assign Billing Codes** section in the **Classroom Scenario** document to assign each of the available billing codes to the users and departments listed.