

# **1. BULK REMOVE UNUSED BATCHES**



ADMINS offers a feature to remove unused collections batches en-masse. Batches created seven or more days ago will be available to delete with this process. To access the steps menu for removing unused collections batches, click on: Collections ► Payments ► Remove Unused RC Batches. The command is also available under the Collections ► Treasury Receipts menu.

### 1.1. Restart Step Process

restart. [AUC] 4583-Retheresa] File Edit Ledgounts Pavable Fixed Assets Human Resources Budget Collections Tax h 🛍 🎒 🔐 🔍 🖬 😭 🛃 🎧 Task 4584: Restart Step Process × **Restart Step Process** Removed Unused RC Batches Goto Are you sure? 🛛 No 🖲 Yes Date Start Restart Step Process Actions Edit List OK Lookup Cancel Clear All RCREMBAT-

## 1.2. Select Unused RC Batches



Running the [Select Unused RC Batches] will produce a report similar to the one shown in Figure 1.

The first step on the menu restarts the process; click on the **O** Yes radio button and then click on **[OK]** to



🚸 TedRE - R	C_Remo	oveUnusedBatch	es_Edit_THERESA[2].lis					_		×
File Edit F	ormat	Options								
Courier New		9	• B / U • •		6					
4588-RCRE	RCREI	MBATEDT.REP	Printed 11-Sep	p-2019 at 15:28:31 by Town of Admins Edit List	THERESA			Page	1	
Batch	Туре	Trx Date	Batch Owner	Entry Owner	Entry Date	Entered Amt	Batch Status			
Batch Sele	cted 1	to be Removed	d							
814	R	23-Jul-2019	DIMOND	DIMOND	23-Jul-2019		Unused			
755	R	11-Feb-2019	THERESA	THERESA	11-Feb-2019		Unused			
807	А	28-Jun-2019	THERESA	THERESA	28-Jun-2019		Unused			
808	А	28-Jun-2019	THERESA	THERESA	28-Jun-2019		Unused			
737	R	18-Dec-2018	WENDY	WENDY	18-Dec-2018		Unused			
759	R	25-Feb-2019	WENDY	WENDY	25-Feb-2019		Unused			
804	А	27-Jun-2019	WENDY	WENDY	27-Jun-2019		Unused			
Total #Bat	ches	7								
Selection	Legen	d:								
Includ	le: On	ly batches se	elected to be removed							

#### Figure 1 Report of unused batches created more than seven days ago available for removal

Review the report; if any batches need to be excluded, click on the [Modify Selected Batches] button:

### **1.3.** Modify Selected Batches



#### Figure 2 The Modify Selected Batches Screen

There are three buttons available on the screen.

Button	Description/How Used
[1 Steps]	This button returns the display to the steps menu
[2 Select All]	Select all batches with this button; then clear any checkboxes for batches that should not be removed
[3 DeSelect All]	Remove all the checkmarks 🗹 from the Sel column using this button

Property of ADMINS, Inc. No unauthorized use, distribution or reproduction permitted.



Column Label	How Used
Sel	$ earrow$ Click in the box to select the batch for removal; $\Box$ clear the box if the batch should not be removed.
[4 Batch]	By default, the data is sorted by batch number.
Туре	The batch type – R for Receipt, A for Adjustment
[6 Pay Date]	The batch was assigned a pay date when it was created; the data may be sorted by pay date by clicking on this button
[7 BatchOwner]	The current owner of the batch is shown in this column – the data may be sorted by owner by clicking on this button
[8 Entry Owner]	The originator of the batch – the data may be sorted by entry owner by clicking on this button
Entry Date	The date the batch was created
Entered Amount	The dollar amount entered on the batch screen
Batch Status	By definition, only batches with a status of Unused should appear on this screen

There are nine columns on the screen, described in the table below:

### 1.4. Edit List

Removed Unus	ed RC Bat	Task 4588: Edit List				
Description Date Start			Edit List			
Restart Step Process	23-Sep-2019	11:12:13.49	Include  All O Only Batches selected O Batches not selected			
Select unused RC batches	23-Sep-2019	11:48:14.01	· · · · · · · · · · · · · · · · · · ·			
Modify selected batches	23-Sep-2019	11:48:27.66				
Remove			If Printing use Duplex   Yes  No			
			Lookup OK Cancel Clear All			
RCREMBAT-Sin	gle User					

Click on **[Edit List]** to view or print a list of the batches with information about which were selected. The default selection for the edit list is to show **③** All batches; both selected and not selected for removal. Two more options are available: **④** Only Batches selected will produce an edit list of only those batches selected for removal; **④** Batches not selected will list only the batches not selected for removal.



			(= +   <del>+</del>	к	C_RemoveUnusedBate	thes_Edit_THERESA(3	jami - iviicrosoft E	xcei	- U	
TedRE - RC_RemoveUnusedBatches_Edit_THERESA[4].lis	×	File	Home Ins	ert Page Layo	ut Formulas	Data Review	View		♥ 🕜 📼	á
File Edit Format Options		L2	6							_
		A	В	С	D	E	F	G	Н	
4588-RCREP:RCREMBATEDT.REP Printed 11-Sep-2019 at 17:17:49 by THERESA	Page 1	1 Batc	h Type	Trx-Date	Batch-Owner	Entry-Owner	Entry-Date	Entered-Amt	Batch-Stat	u
Town of Admins Edit List	2	2 Batc	h Selecte	d to be Rem	oved					
		3								
Batch Type Try Date Batch Owner Entry Owner Entry Date Entered Amt Batch	ch Status	4 755	R	2/11/2019	THERESA	THERESA	2/11/2019		Unused	
		5 807	Α	6/28/2019	THERESA	THERESA	6/28/2019		Unused	
Batch Selected to be Removed	6	6 808	Α	6/28/2019	THERESA	THERESA	6/28/2019		Unused	
		7 737	R	12/18/2018	WENDY	WENDY	12/18/2018		Unused	
755 R 11-Feb-2019 THERESA THERESA 11-Feb-2019 Unus 807 A 28-Jun-2019 THERESA THERESA 28-Jun-2019 Unus	ized S	8 759	R	2/25/2019	WENDY	WENDY	2/25/2019		Unused	
808 A 28-Jun-2019 THERESA THERESA 28-Jun-2019 Unus	ized	0 804	Δ	6/27/2010	WENDY	WENDY	6/27/2010		Unusod	
737 R 18-Dec-2018 WENDY WENDY 18-Dec-2018 Unus 759 R 25-Feb-2019 WENDY WENDY 25-Feb-2019 Unus	ared and a second se	004	~	0/21/2015	WENDT	WENDT	0/21/2015		Unused	
804 A 27-Jun-2019 WENDY WENDY 27-Jun-2019 Unus	ized									
Toral #Barchas 6		1 Iotal	#B	atches	6					
10011 10000000 0	1	2								
Parah war anlaanad	1	3 Batc	h not sele	ected						
	1	4								
814 R 23-Jul-2019 DIMOND DIMOND 23-Jul-2019 Unum	used 1	5 814	R	7/23/2019	DIMOND	DIMOND	7/23/2019		Unused	
Total #Batches 1	1	6								
	1	7 Total	#B	latches	1					
		9		atomos						
Selection Legend:	1	4 1 1	Rcrembated	11 /91			14			1
Taclude: 311 Barches	R	leady	i con combatteo					<b>I</b> I 149% (=		
include: All Decomes		icody							· · · · ·	÷

Figure 3 The Edit List shows the batches to be selected for removal, and those not selected

### 1.5. Remove Selected RC Batches

Removed Unus	sed RC Batches			📧 Task 4589: Remove selected RC batches 🛛 🗙
Description Date Start End Success				Remove selected RC batches
Restart Step Process	23-Sep-2019 11:12:13.	49 11:12:16.	43 🗹	
Select unused RC batches	23-Sep-2019 11:48:14.	01 11:48:19.	09 🗹	Duran de la desta desta
Modify selected batches	23-Sep-2019 11:48:27.	56 11:48:28.	05 🗹 📗	Rull as Preview Print OPDF Excel
Edit Liet	23-Sep-2019 11:56:33.	02 11:56:35.	08 🗹 🔰	If Printing use Duplex  yes O No
Remove selected RC batc	hes			Lookup OK Cancel Clear All

The last button in the steps menu will remove the selected batches. A list of the removed batches will be created; it is available to **Run as Preview/Print/PDF**<sup>®</sup> or **Excel**<sup>®</sup> format. **Preview/Print/PDF**<sup>®</sup> format is shown in **Figure 4**.

😽 TedRE	- RC_Rem	ioveUnusedBatch	es_Edit_THERESA[5].	lis				-	×
File Edit	Format	Options							
Courier N	lew	• 9	- <u>B</u> <i>I</i> <u>U</u> ■		4				
4589-RCF	REP:RCRE	MBATPST.REP	Printed	11-Sep-2019 at 17:28:07 by Town of Admins Remove selected RC bat	THERESA			Page 1	^
Batch	Туре	Trx Date	Batch Owner	Entry Owner	Entry Date	Entered Amt	Batch Status		
Batches	Removed	i							
755	R	11-Feb-2019	THERESA	THERESA	11-Feb-2019		Unused		
807	А	28-Jun-2019	THERESA	THERESA	28-Jun-2019		Unused		
808	А	28-Jun-2019	THERESA	THERESA	28-Jun-2019		Unused		
737	R	18-Dec-2018	WENDY	WENDY	18-Dec-2018		Unused		
759	R	25-Feb-2019	WENDY	WENDY	25-Feb-2019		Unused		
804	А	27-Jun-2019	WENDY	WENDY	27-Jun-2019		Unused		
Total #H	Batches	6							~

Figure 4 Remove Selected RC Batches Report

#### 1.5.1. Can Removed Batches Be Restored?

No, create a new batch.