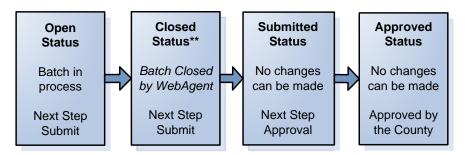


# **Managing Batches**

Batches are created as renewals are processed. There are four batch statuses and the diagram below shows the flow of a batch.



What you can do within each batch is determined by the batch status and the authorized actions given to you in WebSub. The following is a list of the available actions within each batch status:

*Open Status* → Submit Batch, and View, Reprint, or Void renewals in batch

Closed Status → Submit Batch, and View, Reprint, or Void renewals in batch

Submitted Status → View Only, only the county can make changes

*Approved Status* → View Only, no changes can be made

A county establishes limits for all batches for each location.

#### WebSub limits include:

- Number of days in a batch cannot exceed 7 days
- Number of renewals in a batch cannot exceed 1,000

When one of the number of days or number of renewal limits set by the county are reached, WebSub will automatically close the batch and begin another batch with the next processed renewal. \*\*Closed status only occurs when one of the limits is reached.

It is up to your location to <u>submit</u> the batch to the county. A batch can be submitted in both an open or closed status, however; you should submit batches based on your county's preference.

# **Viewing Batches**

To see a list of batches to view, select "Manage Batches" from the Actions Menu.

Filters can assist you in locating a batch. Batches are automatically filtered to show only those within a 30-day period. You can also filter by batch status.

The Actions column lists the actions available for each batch.

You can view different levels of information for each batch.

**Level 1.** Viewing the Manage Batches page will list all the batches for your location. Click "View" on a batch to see the details.



Manage Batches Page

Level 2. Viewing the Batch Detail

page will list each renewal that was processed within that specific batch by license plate number. Click "View" on a plate to open the Vehicle Record.

Level 3. Viewing the Vehicle Record contains vehicle and transaction information.

# **Submitting Batches**

In order to submit a batch, the Actions column must show Open or Closed as the status.

Step 1. On the Manage Batches Page, find the batch you need to submit to your county. Click "Submit".

Step 2. Click "Yes" to confirm.

The status changes automatically to submitted.



You can also Submit a batch from the Batch Detail Page.

Step 1. From the Manage Batches page, find the batch you need to submit to your county. Click "View."

Batch Detail

LIAMSON Batch ID: 3662 Status: Open B

Date Time Plate Expires Print Oty Insur

d 09/20/2012 04:18 PM 34VJM9 09/2012 1 Electronic

Export data to Excel / Generate Report

Submit Batch Cancel

**Batch Detail Page** 

Step 2. Near the bottom of the page, Click "Submit."

Step. 3 Click "Yes" to confirm.

You are returned to the Manage Batches page and the status updates to submitted.



# **Printing Batches**

Batches can be printed in a PDF or Excel format. Select "Generate Report" to get a PDF or select "Export data to Excel" to get an Excel report. Reports printed using these two formats will print all transactions within a specific batch.



### **Daily Report**

This report allows an Agent or TAC location to print reports based on a specific day instead of a specific batch.

- Step 1. Select Manage Batches from the Actions Menu.
- Step 2. Select "Daily Report."
- Step 3. Enter the date you would like to print a report for and select "Choose." If no transactions match the date entered the message "No renewals were found for the date entered" will display.



If the search is successful, all transactions for that date will be listed on the screen regardless of batch number, batch status or county associated with the renewal.

Step 4. Select "Generate Report" to print a PDF or click "Export data to excel" to print an Excel report of the transactions.



**Example of Daily Report Results** 

