# Bill Group Setup

Last Modified on 07/16/2024 3:57 pm EDT

**Pathway:** *Setup > Accounting > Bill Group*

Bill Groups establish the billing settings an account will follow and are assigned when an account is created. Because accounts may share the same billing criteria, a Bill Group can be assigned to multiple accounts.
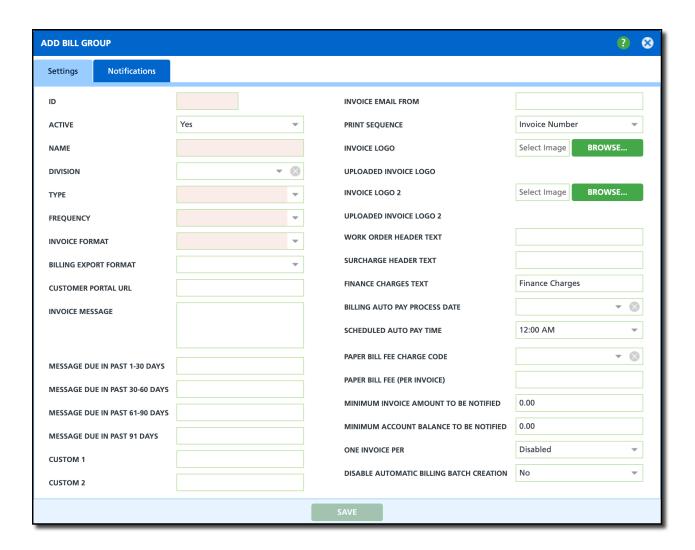


## Permission

The following permission is required to view and edit in the Bill Group Setup screen:

| Permission Name | Permission ID |
| --- | --- |
| 22 | Setup \ Accounting |

# Bill Group: Settings

The Settings tab captures the billing details specific to the Bill Group and the accounts it will be assigned to.

## Settings Field Descriptions

| Fields | Descriptions |
|---|---|
| **ID** <br> *Required* | The ID for the Bill Group. <br> *Alphanumeric, 10 character limit* |
| **Active** <br> *Required* | Controls if the Bill Group is available for selection when accounts are added or edited. <br> • Yes = Active <br> • No = Inactive |
| **Name** <br> *Required* | Name of the Bill Group. |
| **Division** | Controls if the Bill Group is division specific, or available to all divisions. <br> *In Billing, if a billing batch includes a bill group without a specified division, there is an option to omit divisions.* |
| **Type** <br> *Required* | Indicates if accounts assigned the Bill Group are billed in advance or behind. <br> • Advance - Bill ahead for pending services. <br> • Arrears - Bill after service is complete. |
| **Frequency** <br> *Required* | Determines the billing frequency accounts assigned to the Bill Group will follow. |
| **Invoice Format** | Identifies the invoice format accounts assigned to the Bill Group will receive. |

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| **Billing Export Format** | Select Export format for multiple invoices to export and to be sent out. |
| **Customer Portal URL** | Field to enter a unique Account Portal URL for accounts assigned to the Bill Group. |
| **Invoice Message** | Message content entered here will display on invoices of supported formats. |
| **Message Due In:** Past 1- 30 Days Past 30 - 60 Days Past 61 - 90 Days Past 91 Days | Enter a custom message into the Message Due fields that will display on invoices of supported formats. |
| Custom 1 & 2 | Custom message that will be sent out with notification for the first and then second past du warning. |
| **Invoice Email From** | The Email correspondence that will display on invoices for accounts belonging to the Bill Group. |
| **Print Sequence** | The order in which the Invoices should be organized to print. |
| **Invoice Logo** | The logo that will display on invoices for accounts belonging to the Bill Group. |
| **Uploaded Invoice Logo** | Displays an image of the logo. |
| **Invoice Logo 2** | If supported by the invoice format, option to add a second logo to the invoice for the bill group. |
| **Uploaded Invoice Logo 2** | Displays an image of Logo 2. |
| **Work Order Header Text** | If supported by the invoice format, Work Order text entered here will display on the invoice for accounts of the bill group. |
| **Surcharge Header Text** | If supported by the invoice format, Surcharge Header text entered here will display on the invoice for the accounts of the bill group. |
| **Finance Charges Text** | If supported by the invoice format, displays the Finance Charge text on the invoice for accounts of the bill group. |
| **Billing Auto Pay Process Date** | Controls when auto pay processing is run. <ul><li>Process Immediately - Processes the payment once all fields have been completed and saved.</li><li>Invoice Date - Payment is processed the same day the invoice was generated.</li><li>10 Days After Invoice Date - Payment is processed 10 days after the Invoice was generated.</li></ul> |
| **Scheduled Auto Pay Time** | The time of day auto pay is processed for accounts belonging to the bill group. Recommended to be set before Credit Card Settlement time. |
| **Paper Bill Fee Charge Code** | The charge code that displays on the invoice and on the customer service screen for paper billing. *Paper billing is enabled once a charge code has been selected and a Paper Bill Fee amount entered.* |
| **Paper Bill Fee (Per Invoice)** | The amount that will be automatically applied to the invoice for paper billing. *Paper billing is enabled once a charge code has been selected and a Paper Bill Fee amount entered.* |

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|---|---|
| **Minimum Invoice Amount To Be Notified** | The minimum amount required for an invoice to print or email. |
| **Minimum Account Balance To Be Notified** | The minimum account balance required to send automatic past due notifications. |
| **One Invoice Per** | Establishes a default setting for the bill group to control how invoices are billed. Options include:<br>• Disabled<br>• PO Number - creates one invoice for each purchase order.<br>• Work Order Number - creates one invoice for each completed work order. |
| **Disable Automatic Billing Batch Creation** | Option to disable the system from creating a new billing batch after a batch has been marked complete. |

# Add Bill Group Settings

1. Click the **+** to open the 'Add Bill Group' screen.
2. Complete the following *Required* fields:
   - Enter an **ID.**
   - Select 'Yes' to make the Bill Group **Active** for selection.
   - Enter a **Name** for the Bill Group.
   - Select the preferred billing **Type.**
   - Select the preferred **Frequency** accounts belonging to the Bill Group will be billed on.
3. Complete additional fields based on your company's setup requirements.
4. Click **Save** to finish.
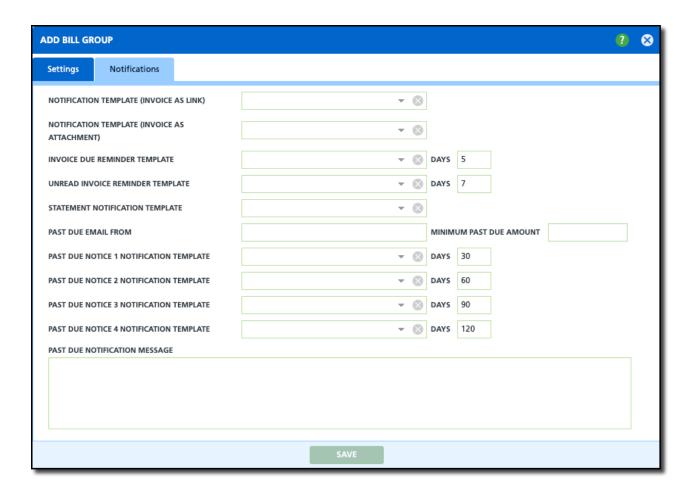
# Bill Group: Notifications

From the Notifications tab, assign notification templates and control when notifications are issued to accounts belonging to the Bill Group.  Account contacts will receive a past due notification if the following conditions are met:

1. The past due amount for an account is in an aging bucket that corresponds with the notification's Days entered value.
2. The account has yet to receive a notification using the identical template within the last 30 days.
   - Recommendation: select a different template for each Past Due Notice notification.

> ℹ️ To complete fields in the Notifications tab, a notification template must be created first in *Setup > System > Notification Template.*

## Notifications Field Descriptions

| Fields | Descriptions |
|---|---|
| Notification Template (Invoice As A Link) | Select the template that will be used for invoices sent as an email link. |
| Notification Template (Invoice As An Attachment) | Select the template that will be used for invoices sent as an email attachment. |
| Invoice Due Reminder Template | Select a template that will be used for invoice due reminders. **Days** field: Enter the number of days before the payment is due a reminder is sent out. |
| Unread Invoice Reminder Template | Select a template that will be used for invoice due reminders if the previous reminder's status is 'unread'. **Days field:** Enter the number of days an invoice email must have an 'Unread' status before the Unread Invoice Reminder is sent. |
| Statement Notification Template | Select the template that will be used for emailed statements. |
| Past Due Email From | Field to enter who the past due emails are from. Enter a name, email address or business name. |
| Past Due Notice Notification Templates (1-4) | Select the templates that will be used for past due notifications. Option to create up to four Past Due Notice templates. **Days field:** Enter the number of days after the payment is past due the notification is sent. |
| Past Due Notification Message | The message preset to send to notify a customer of a past due payment. |