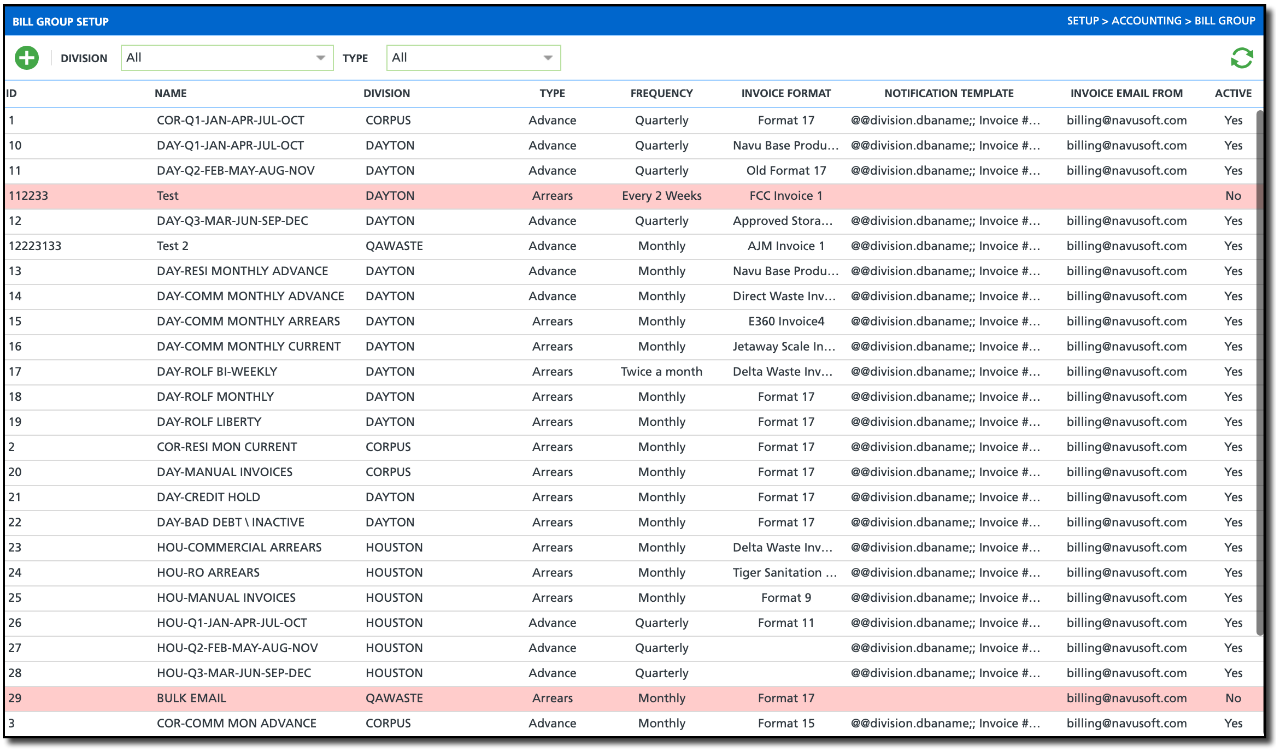
Bill Group Setup

Last Modified on 04/22/2026 1:59 pm PDT

Pathway: *Setup > Accounting > Bill Group*

A Bill Group establishes the billing settings an account will follow and is assigned when an account is created. Because accounts often share the same billing criteria, a single Bill Group can be assigned to multiple accounts. The **Bill Group Setup** screens is the tool used to configure the Bill Groups.


BILL GROUP SETUP

SETUP > ACCOUNTING > BILL GROUP

DIVISION All TYPE All

ID	NAME	DIVISION	TYPE	FREQUENCY	INVOICE FORMAT	NOTIFICATION TEMPLATE	INVOICE EMAIL FROM	ACTIVE
1	COR-Q1-JAN-APR-JUL-OCT	CORPUS	Advance	Quarterly	Format 17	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
10	DAY-Q1-JAN-APR-JUL-OCT	DAYTON	Advance	Quarterly	Navu Base Produ...	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
11	DAY-Q2-FEB-MAY-AUG-NOV	DAYTON	Advance	Quarterly	Old Format 17	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
112233	Test	DAYTON	Arrears	Every 2 Weeks	FCC Invoice 1			No
12	DAY-Q3-MAR-JUN-SEP-DEC	DAYTON	Advance	Quarterly	Approved Stora...	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
12223133	Test 2	QAWASTE	Advance	Monthly	AJM Invoice 1	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
13	DAY-RESI MONTHLY ADVANCE	DAYTON	Advance	Monthly	Navu Base Produ...	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
14	DAY-COMM MONTHLY ADVANCE	DAYTON	Advance	Monthly	Direct Waste Inv...	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
15	DAY-COMM MONTHLY ARREARS	DAYTON	Arrears	Monthly	E360 Invoice4	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
16	DAY-COMM MONTHLY CURRENT	DAYTON	Arrears	Monthly	Jetaway Scale In...	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
17	DAY-ROLF BI-WEEKLY	DAYTON	Arrears	Twice a month	Delta Waste Inv...	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
18	DAY-ROLF MONTHLY	DAYTON	Arrears	Monthly	Format 17	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
19	DAY-ROLF LIBERTY	DAYTON	Arrears	Monthly	Format 17	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
2	COR-RESI MON CURRENT	CORPUS	Arrears	Monthly	Format 17	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
20	DAY-MANUAL INVOICES	CORPUS	Arrears	Monthly	Format 17	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
21	DAY-CREDIT HOLD	DAYTON	Arrears	Monthly	Format 17	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
22	DAY-BAD DEBT \ INACTIVE	DAYTON	Arrears	Monthly	Format 17	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
23	HOU-COMMERCIAL ARREARS	HOUSTON	Arrears	Monthly	Delta Waste Inv...	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
24	HOU-RO ARREARS	HOUSTON	Arrears	Monthly	Tiger Sanitation ...	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
25	HOU-MANUAL INVOICES	HOUSTON	Arrears	Monthly	Format 9	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
26	HOU-Q1-JAN-APR-JUL-OCT	HOUSTON	Advance	Quarterly	Format 11	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
27	HOU-Q2-FEB-MAY-AUG-NOV	HOUSTON	Advance	Quarterly		@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
28	HOU-Q3-MAR-JUN-SEP-DEC	HOUSTON	Advance	Quarterly		@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes
29	BULK EMAIL	QAWASTE	Arrears	Monthly	Format 17		billing@navusoft.com	No
3	COR-COMM MON ADVANCE	CORPUS	Advance	Monthly	Format 15	@@division.dbaname;; Invoice #...	billing@navusoft.com	Yes

Expand All Sections

Collapse All Sections

Helpful Tip: To search all text using **CTRL**-F, you must first click on the Expand All Sections button.

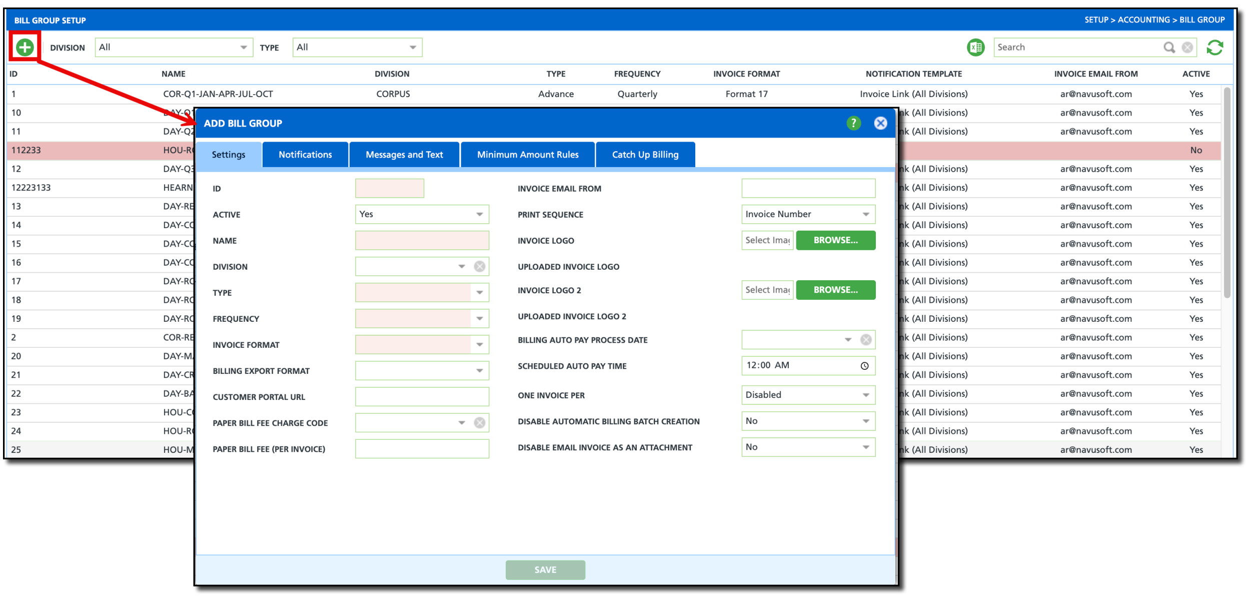
Filter and Field Descriptions

Filters	Descriptions
Division	Select All or one division to view all Bill Groups or just those for a specific division.
Type	Select All to view all or select either Advance or Arrears to view only those types of Bill Groups.
Fields	
ID	A numerical identification for the Bill Group.
Name	The name of the Bill Group.

Division	The division the Bill Group is assigned to. **In Billing, if a billing batch includes a bill group without a specified division, there is an option to omit divisions.*
Type	Dictates when the service is charged. • Advance - Bill ahead for pending services. • Arrears - Bill after service is complete.
Frequency	The billing frequency accounts assigned to the Bill Group will follow. In order to invoice, the UOM for the Service Code needs to match the frequency. Related Documentation: Anniversary 4 Week Billing (28 Day)
Invoice Format	The invoice format accounts assigned to the Bill Group will receive.
Notification Template	The template that will be used for invoices sent as an email link.
Invoice Email From	The Email correspondence that will display on invoices for accounts belonging to the Bill Group.
Active	Indicator if the Bill Group is available for selection when accounts are added or edited. • Yes = Active • No = Inactive

Add/Edit a Bill Group

To add a Bill Group, use the following steps and the Field Descriptions provided for each tab below. Once created and active, the bill group can be selected when creating a Billing Batches and reporting.

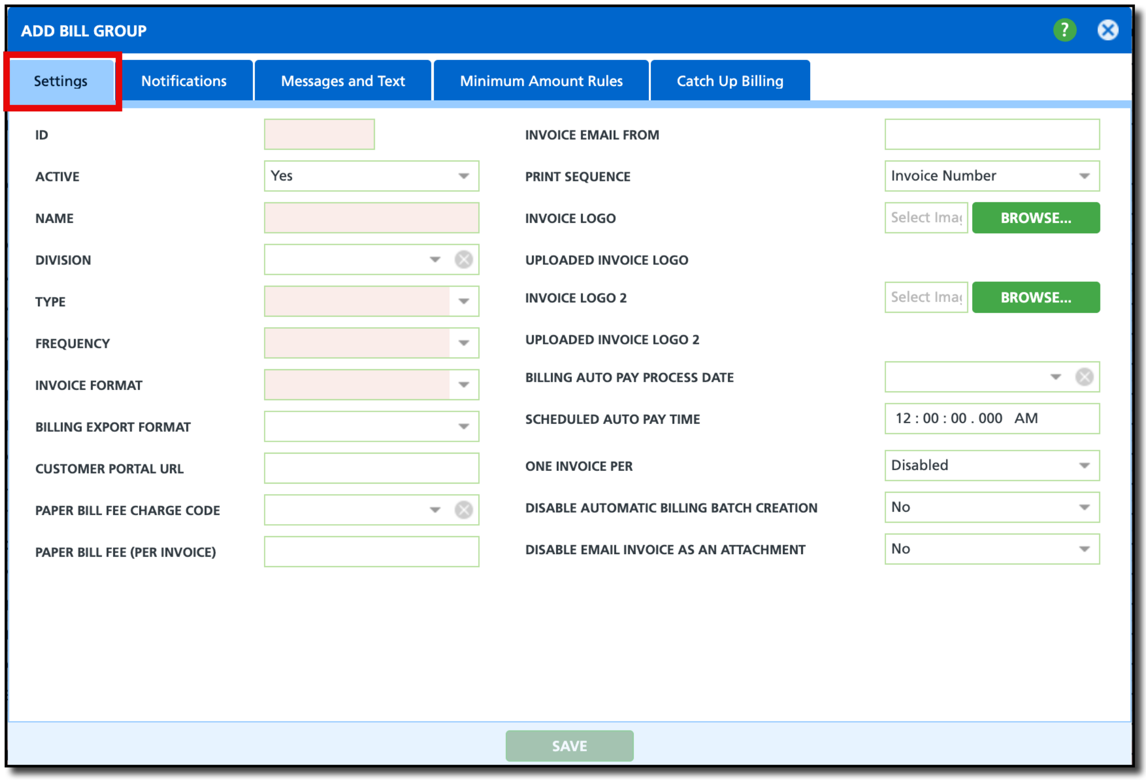


Attention: Once setup configurations are established, changes to required fields can negatively impact accounts, particularly in service and billing. Make changes with caution and system awareness.

1. Click the **green +** icon to display the *Add Bill Group* editor.
2. Enter the **required** fields needed to create a Bill Group.
   a. Unique **ID**
   b. Descriptive **Name**
   c. Billing **Type**, whether it is Arrears or Advance
   d. Billing **Frequency**, how often the billing will occur
   e. **Invoice Format,** format to be used when generating the invoice
3. Follow your established practice and procedures to complete the other fields on this tab and the other tabs.
   *Refer to the sections below to learn more about each field on each tab.
4. To make sure the Bill Group is visible and usable, set **Active** to 'Yes'.
5. Click **Save** when finished.

Bill Group: Settings Tab

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



Settings Field Descriptions

Attention: Once setup configurations are established, changes to required fields can negatively impact accounts, particularly in service and billing. Make changes with caution and system awareness.

Fields	Descriptions

ID *Required*	The ID for the Bill Group. *Alphanumeric, 10 character limit*
Active *Required*	Controls if the Bill Group is available for selection when accounts are added or edited. • Yes = Active • No = Inactive
Name *Required*	A descriptive name of the Bill Group.
Division	Controls if the Bill Group is division specific, or available to all divisions. **In Billing, if a billing batch includes a bill group without a specified division, there is an option to omit divisions.*
Type *Required*	How the Bill Group is billed: • Advance - Bill ahead for pending services. • Arrears - Bill after service is complete.
Frequency *Required*	The billing frequency that the accounts assigned to the Bill Group will follow. In order to invoice, the UOM for the Service Code needs to match the frequency. Related Documentation: Anniversary 4 Week Billing (28 Day)
Invoice Format *Required*	The invoice format accounts assigned to the Bill Group will receive.
Billing Export Format	The Export format for multiple invoices to export and to be sent out.
Customer Portal URL	The unique Account Portal URL for accounts assigned to the Bill Group.
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.*
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.
Billing Auto Pay Process Date	Controls when auto pay processing is run. • Process Immediately - Processes the payment once all fields have been completed and saved. • Invoice Date - Payment is processed the same day the invoice was generated. • 10 Days After Invoice Date - Payment is processed 10 days after the Invoice was generated.
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.
One Invoice Per	Establishes a default setting for the bill group to control how invoices are billed. Options include: • Disabled • PO Number - creates one invoice for each purchase order. • 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.
Disable Email Invoice As An Attachment	Option to disable the system from allowing invoices to be emailed as an attachment.

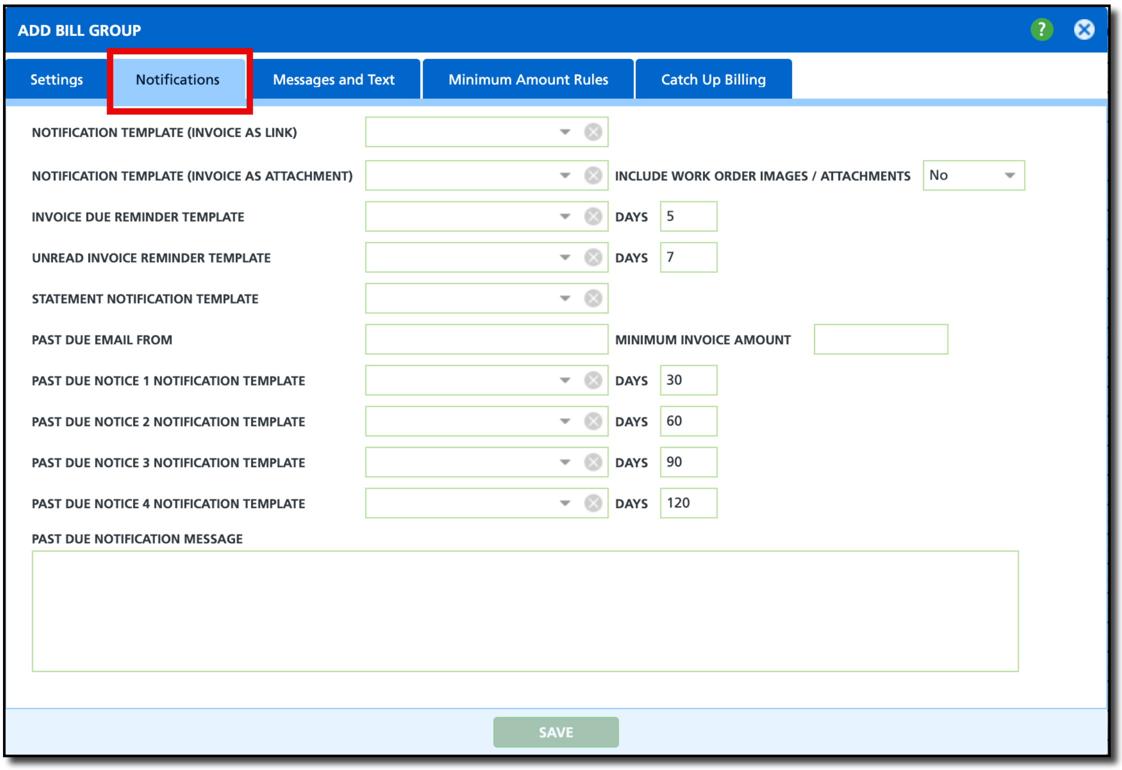
Bill Group: Notifications Tab

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.

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

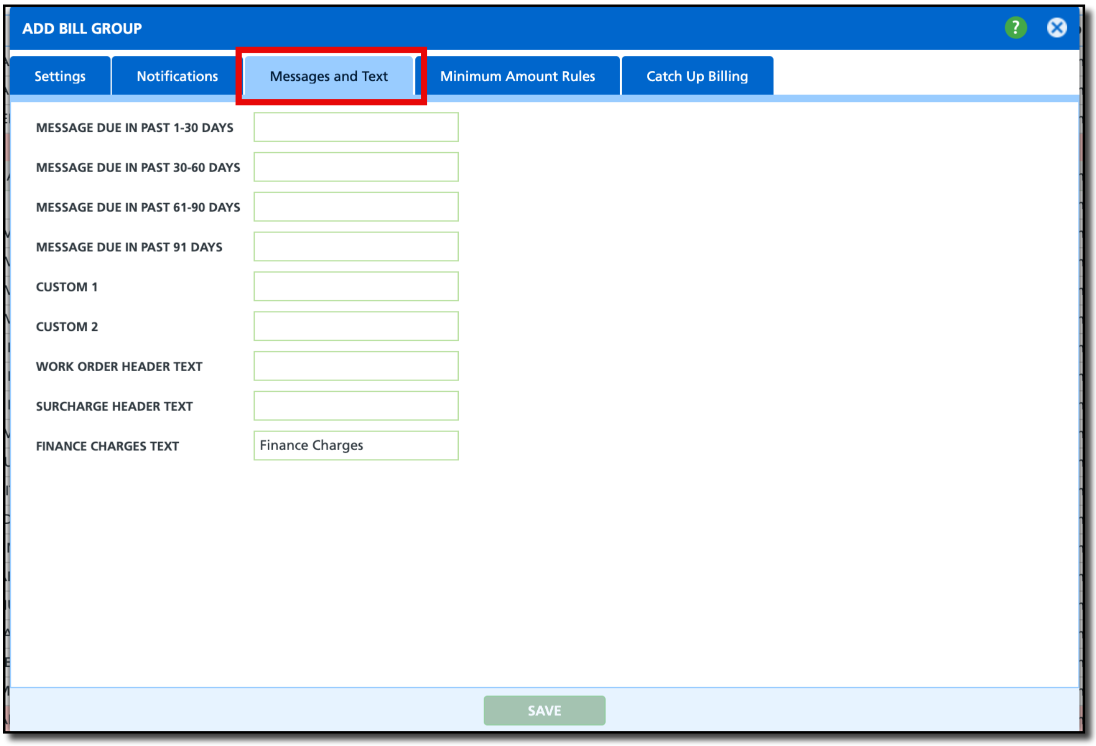


Notifications Field Descriptions

Fields	Descriptions
Notification Template (Invoice As Link)	The template that will be used for invoices sent as an email link.
Notification Template (Invoice As Attachment)	The template that will be used for invoices sent as an email attachment.
Invoice Due Reminder Template	The 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	The 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 an 'Unread' status before the Unread Invoice Reminder is sent.
Statement Notification Template	The template that will be used for emailed statements.
Past Due Email From	The email that past due emails are from. Enter a name, email address or business name.
Past Due Notice Notification Templates (1-4)	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.

Bill Group: Messages and Text Tab

From the Messages and Text tab, assign notification templates and control when notifications are issued to accounts belonging to the Bill Group.

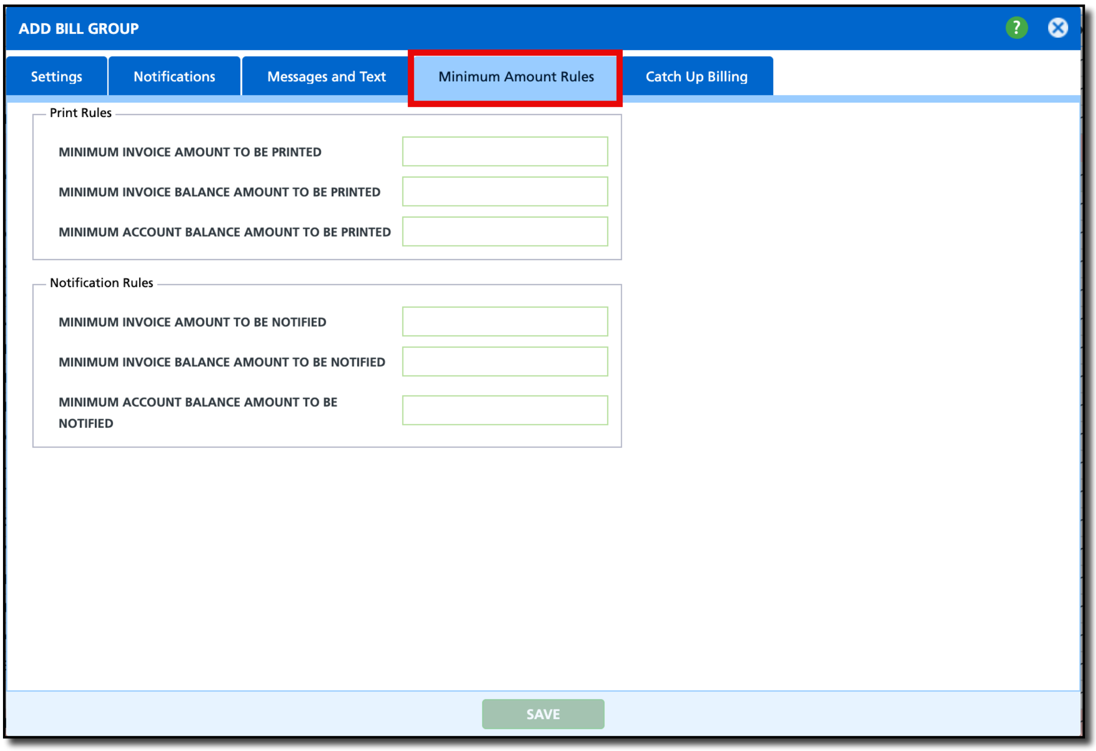


Message and Text Field Descriptions

Fields	Descriptions
Message Due In: Past 1- 30 Days Past 30 - 60 Days Past 61 - 90 Days Past 91 Days	A custom message into the Message Due fields that will display on invoices of supported formats.
Custom 1 & 2	A custom message that will be sent out with notification for the first and then second past due warning.
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.

Bill Group: Minimum Amount Rules Tab

From the Messages and Text tab, assign notification templates and control when notifications are issued to accounts belonging to the Bill Group.

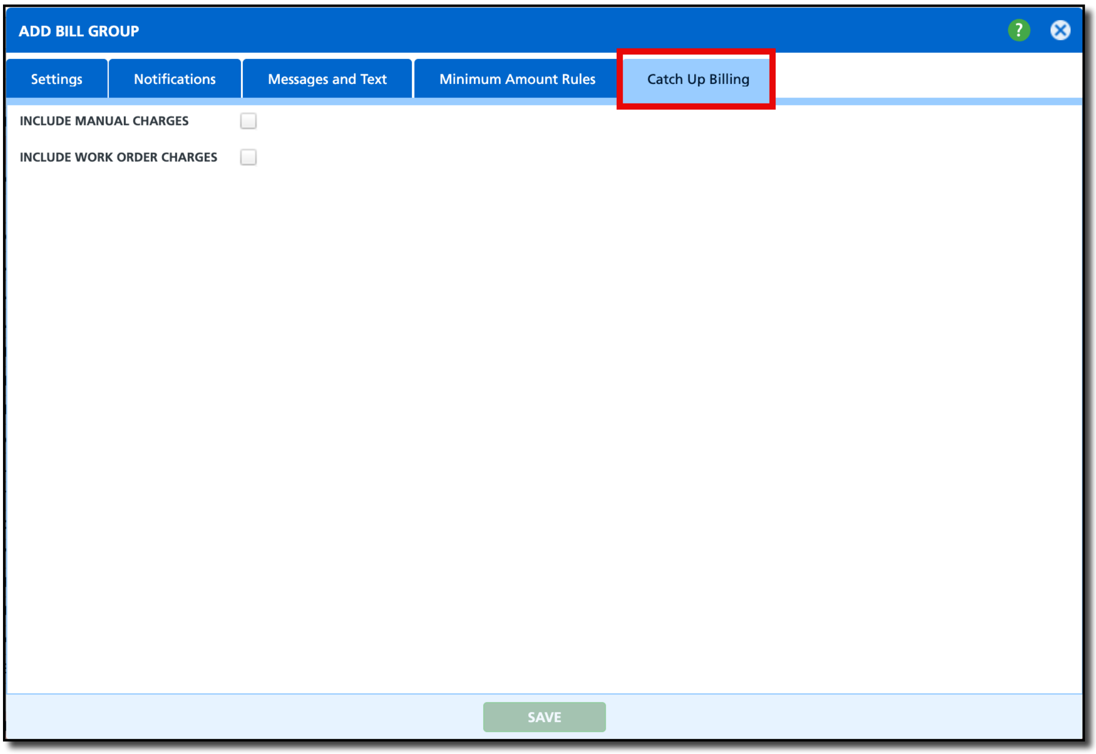


Minimum Amount Rules Field Descriptions

Fields	Descriptions
------ Print Rules ------	
Minimum Invoice Amount To Be Printed	Invoice will be printed only if the **invoice amount** is greater than the minimum amount entered here.
Minimum Invoice Balance Amount To Be Printed	Invoice will be printed only if the **invoice balance** is greater than the minimum amount entered here.
Minimum Account Balance Amount To Be Printed	Invoice will be printed only if the a**ccount balance** is greater than the minimum amount entered here.
----- Notification Rules -----	
Minimum Invoice Amount To Be Notified	Customer to be notified only if the **invoice amount** is greater than the minimum amount entered here.
Minimum Invoice Balance Amount To Be Notified	Customer to be notified only if the **invoice balance** is greater than the minimum amount entered here.
Minimum Account Balance Amount To Be Notified	Customer to be notified only if the **account balance** is greater than the minimum amount entered here.

Bill Group: Catch Up Billing Tab

The **Catch Up Billing** tab allows you to set two specific types of of charges in addition to your flat rate fees:**Manual Charges** and **Work Order Charges**. When enabled, the system scans for any unbilled items from prior billing periods and pulls them into the current Bill Group batch. This ensures that missed services, such as a forgotten extra pickup or a late-entered charges are automatically captured and invoiced, preventing revenue leakage.



Catch Up Billing Field Descriptions

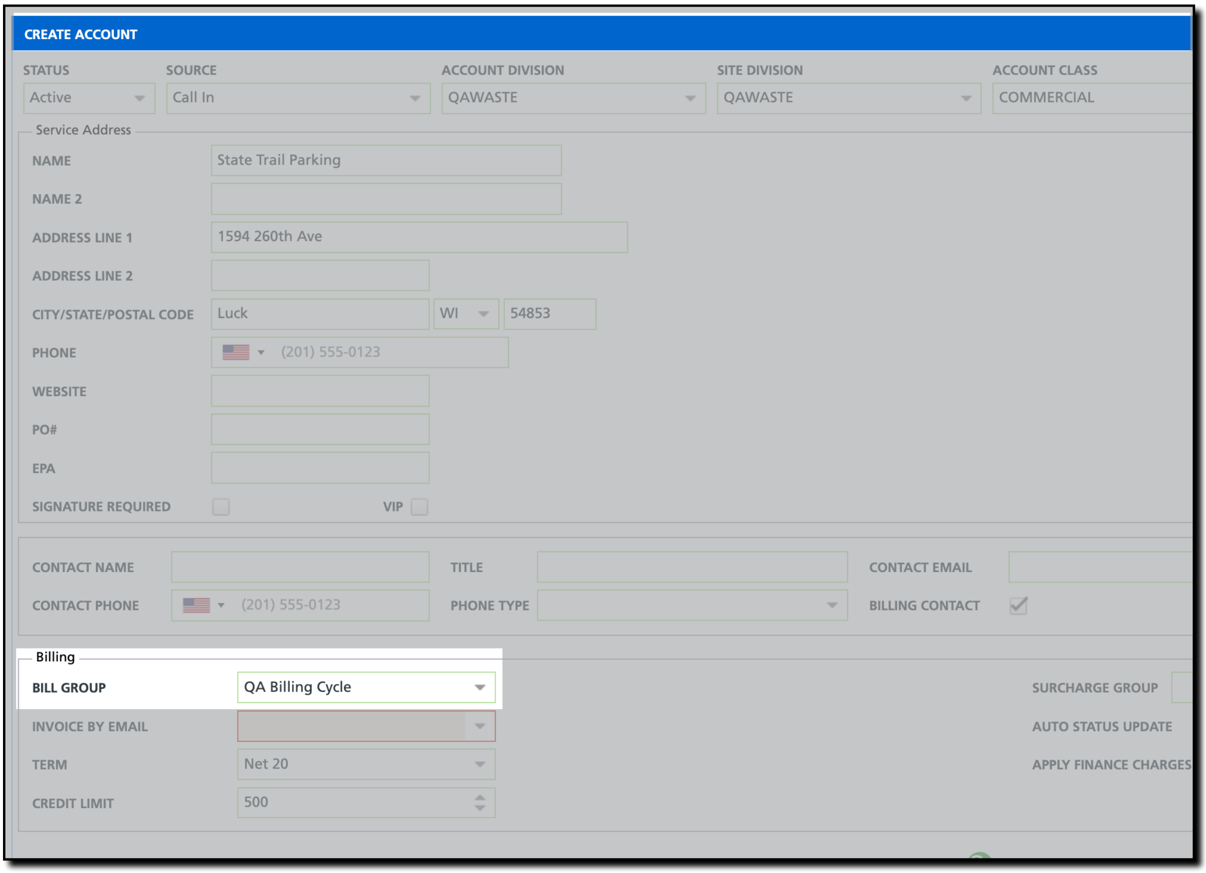
Fields	Descriptions
Include Manual Charges	Check the box to include unbilled manual charges added to an account in the catch-up billing process.
Include Work Order Charges	Check the box to include actual service tickets that were completed in the past but weren't "Posted" in time for the last billing run in the catch-up billing process.

Application of Billing Group

Billing Groups that are set up here (given they are active) are visible and used in many areas with respect to Accounting.

Creating an Account or Editing an Existing

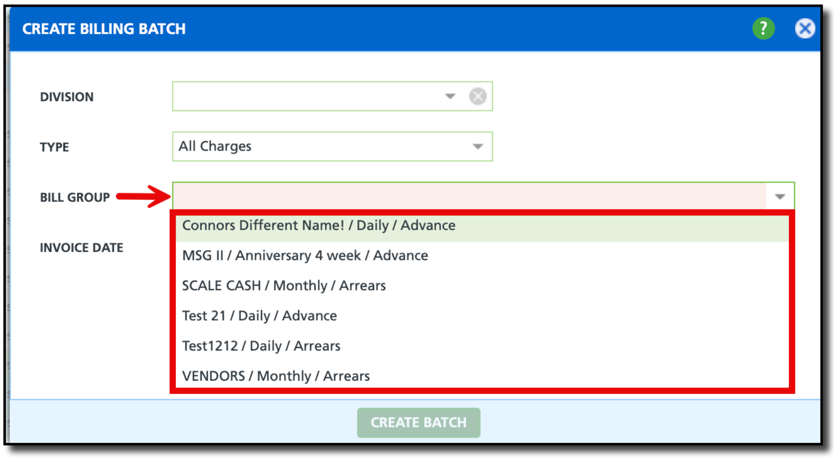
A Bill Group is assigned to an account at the time the account is created and can later be changed from the Edit Account screen.



Pathway: *Accounts > Add Account*

Creating a Billing Batch

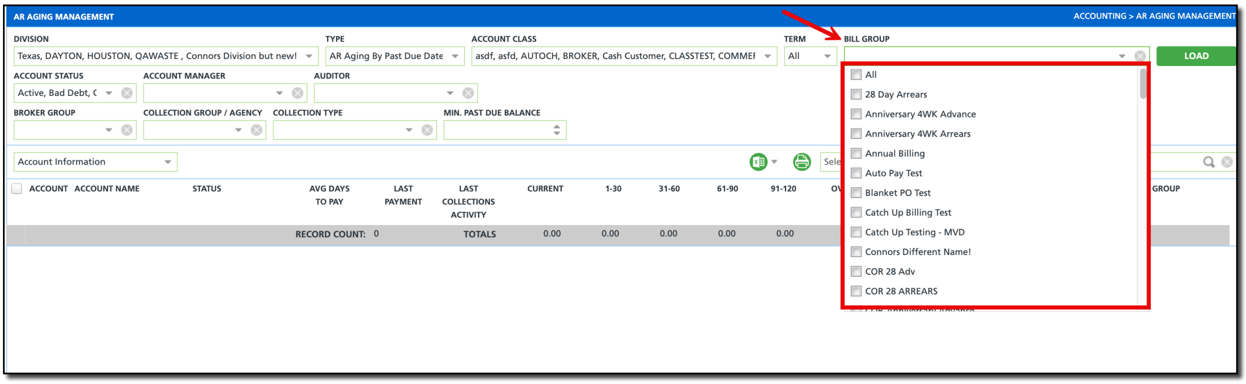
The Bill Group field is a mandatory field when creating a Billing Batch.



Pathway: *Accounting > Billing > Select + icon to create*

Filtering

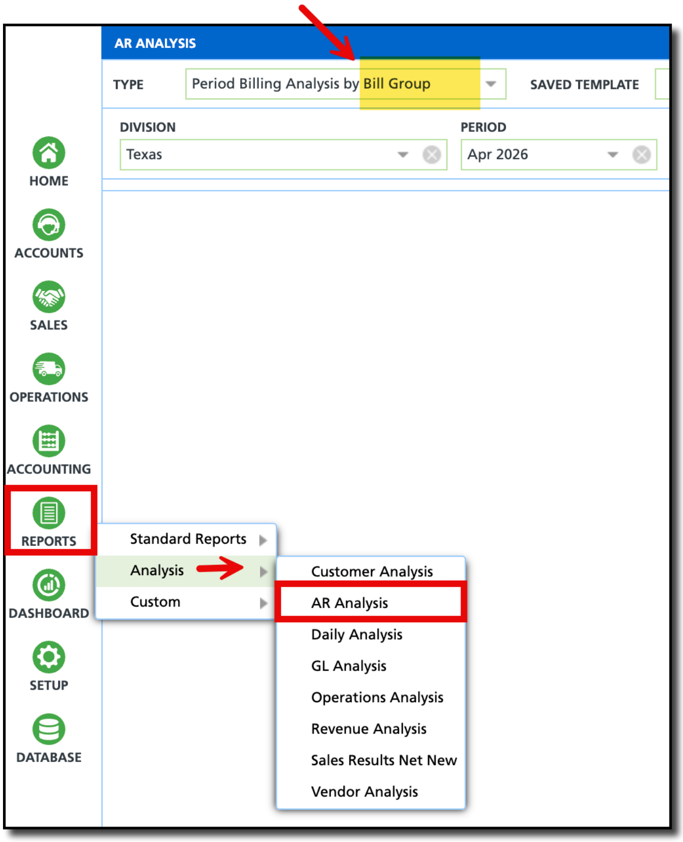
Many of the Accounting screens, provide a Bill Group filter as shown here:



Pathway: *Accounting > AR Aging Management*

Reporting

Specific reports geared towards Bill Group are provided as shown below and can also be generated using tools such as the Database Query Tool.



Permission

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

Permission Name	Permission ID
22	Setup \ Accounting

Database Query Mapping

Use the Database Query Tool to view Bill Group information.

Database > Database Query

The table below provides the entities and the fields that can be used to view details about Bill Groups.

Entity	Fields Relevant to Bill Group
Accounts and Sites	`Account Bill Group Name` The main billing category for a customer `Site Bill Group Name` Used if specific sites under one account are billed differently
Revenue	`Bill Group Name` Join with *Accounts and Sites* to run a sales reports by bill group.
AR History	`Bill Group Name` Use this to see payment history for a bill group.
Aging Results	`billgroup name` Join with Accounts and Sites to see which Bill Groups have the most overdue balances.
Bill Batch Summary	`Bill Group Name` / `Bill Group ID` Key identifier for a bill group `Invoice Count` How many invoices were generated for that group `Billing Batch Status` The status of billing batch; find those that are "pending" `Billingbatch Amount` Total value fo that specific billing run

Related Articles

Billing Screen Overview