

Bill Group Setup

Last Modified on 02/26/2025 2:51 pm PST

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.

BILL GROUP SETUP								SETUP > ACCOUNTING > BILL GROUP	
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	

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.

ADD BILL GROUP
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X

Settings
Notifications

ID	<input type="text"/>	INVOICE EMAIL FROM	<input type="text"/>
ACTIVE	Yes <input type="button" value="v"/>	PRINT SEQUENCE	Invoice Number <input type="button" value="v"/>
NAME	<input type="text"/>	INVOICE LOGO	Select Image <input type="button" value="BROWSE..."/>
DIVISION	<input type="button" value="v"/> <input type="button" value="X"/>	UPLOADED INVOICE LOGO	
TYPE	<input type="button" value="v"/>	INVOICE LOGO 2	Select Image <input type="button" value="BROWSE..."/>
FREQUENCY	<input type="button" value="v"/>	UPLOADED INVOICE LOGO 2	
INVOICE FORMAT	<input type="button" value="v"/>	WORK ORDER HEADER TEXT	<input type="text"/>
BILLING EXPORT FORMAT	<input type="button" value="v"/>	SURCHARGE HEADER TEXT	<input type="text"/>
CUSTOMER PORTAL URL	<input type="text"/>	FINANCE CHARGES TEXT	Finance Charges <input type="text"/>
INVOICE MESSAGE	<input type="text"/>	BILLING AUTO PAY PROCESS DATE	<input type="button" value="v"/> <input type="button" value="X"/>
MESSAGE DUE IN PAST 1-30 DAYS	<input type="text"/>	SCHEDULED AUTO PAY TIME	12:00 AM <input type="button" value="v"/>
MESSAGE DUE IN PAST 30-60 DAYS	<input type="text"/>	PAPER BILL FEE CHARGE CODE	<input type="button" value="v"/> <input type="button" value="X"/>
MESSAGE DUE IN PAST 61-90 DAYS	<input type="text"/>	PAPER BILL FEE (PER INVOICE)	<input type="text"/>
MESSAGE DUE IN PAST 91 DAYS	<input type="text"/>	MINIMUM INVOICE AMOUNT TO BE NOTIFIED	0.00 <input type="text"/>
CUSTOM 1	<input type="text"/>	MINIMUM ACCOUNT BALANCE TO BE NOTIFIED	0.00 <input type="text"/>
CUSTOM 2	<input type="text"/>	ONE INVOICE PER	Disabled <input type="button" value="v"/>
		DISABLE AUTOMATIC BILLING BATCH CREATION	No <input type="button" value="v"/>

Settings Field Descriptions

Fields	Descriptions
ID <i>Required</i>	The ID for the Bill Group. <i>Alphanumeric, 10 character limit</i>
Active <i>Required</i>	Controls if the Bill Group is available for selection when accounts are added or edited. <ul style="list-style-type: none"> Yes = Active No = Inactive
Name <i>Required</i>	Name of the Bill Group.
Division	Controls if the Bill Group is division specific, or available to all divisions. <i>*In Billing, if a billing batch includes a bill group without a specified division, there is an option to omit divisions.</i>
Type <i>Required</i>	Indicates if accounts assigned the Bill Group are billed in advance or behind. <ul style="list-style-type: none"> Advance - Bill ahead for pending services. Arrears - Bill after service is complete.
Frequency <i>Required</i>	Determines 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.
Invoice Format	Identifies the invoice format accounts assigned to the Bill Group will receive.

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 style="list-style-type: none"> • 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.
Paper Bill Fee Charge Code	The charge code that displays on the invoice and on the customer service screen for paper billing. <i>Paper billing is enabled once a charge code has been selected and a Paper Bill Fee amount entered.</i>

Paper Bill Fee (Per Invoice)	The amount that will be automatically applied to the invoice for paper billing. <i>Paper billing is enabled once a charge code has been selected and a Paper Bill Fee amount entered.</i>
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: <ul style="list-style-type: none"> • 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.

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.



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

ADD BILL GROUP
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Settings
Notifications

NOTIFICATION TEMPLATE (INVOICE AS LINK)

NOTIFICATION TEMPLATE (INVOICE AS ATTACHMENT)

INVOICE DUE REMINDER TEMPLATE DAYS

UNREAD INVOICE REMINDER TEMPLATE DAYS

STATEMENT NOTIFICATION TEMPLATE

PAST DUE EMAIL FROM MINIMUM PAST DUE AMOUNT

PAST DUE NOTICE 1 NOTIFICATION TEMPLATE DAYS

PAST DUE NOTICE 2 NOTIFICATION TEMPLATE DAYS

PAST DUE NOTICE 3 NOTIFICATION TEMPLATE DAYS

PAST DUE NOTICE 4 NOTIFICATION TEMPLATE DAYS

PAST DUE NOTIFICATION MESSAGE

SAVE

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.

