

Bill Group Setup

Last Modified on 05/15/2026 1:55 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 |
|------------------|--------------------------|----------|---------|---------------|----------------------|-----------------------------------|----------------------|--------|---------------------------------|
| 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. <i>*In Billing, if a billing batch includes a bill group without a specified division, there is an option to omit divisions.</i> |
| Type | Dictates when the service is charged. <ul style="list-style-type: none"> • 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. <ul style="list-style-type: none"> • 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.

The screenshot displays the 'BILL GROUP SETUP' interface. At the top, there are filters for 'DIVISION' (set to 'All') and 'TYPE' (set to 'All'). Below the filters is a table listing existing bill groups with columns for ID, NAME, DIVISION, TYPE, FREQUENCY, INVOICE FORMAT, NOTIFICATION TEMPLATE, INVOICE EMAIL FROM, and ACTIVE. A red arrow points to a '+' icon in the top left corner of the table, which triggers the 'ADD BILL GROUP' modal.

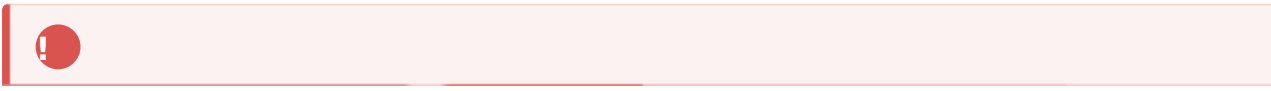
The 'ADD BILL GROUP' modal is open, showing a form with the following fields and options:

- Settings** (selected tab):
 - ID: [Text Input]
 - ACTIVE: Yes (dropdown)
 - NAME: [Text Input]
 - DIVISION: [Dropdown]
 - TYPE: [Dropdown]
 - FREQUENCY: [Dropdown]
 - INVOICE FORMAT: [Dropdown]
 - BILLING EXPORT FORMAT: [Dropdown]
 - CUSTOMER PORTAL URL: [Text Input]
 - PAPER BILL FEE CHARGE CODE: [Dropdown]
 - PAPER BILL FEE (PER INVOICE): [Text Input]
- Notifications** (tab): [Empty]
- Messages and Text** (tab): [Empty]
- Minimum Amount Rules** (tab): [Empty]
- Catch Up Billing** (tab): [Empty]

On the right side of the modal, there are additional fields:

- INVOICE EMAIL FROM: [Text Input]
- PRINT SEQUENCE: Invoice Number (dropdown)
- INVOICE LOGO: Select Image BROWSE...
- UPLOADED INVOICE LOGO: [Text Input]
- INVOICE LOGO 2: Select Image BROWSE...
- UPLOADED INVOICE LOGO 2: [Text Input]
- BILLING AUTO PAY PROCESS DATE: [Dropdown]
- SCHEDULED AUTO PAY TIME: 12:00 AM (dropdown)
- ONE INVOICE PER: Disabled (dropdown)
- DISABLE AUTOMATIC BILLING BATCH CREATION: No (dropdown)
- DISABLE EMAIL INVOICE AS AN ATTACHMENT: No (dropdown)

A 'SAVE' button is located at the bottom of the modal.



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.

ADD BILL GROUP

Settings | Notifications | Messages and Text | Minimum Amount Rules | Catch Up Billing

| | | | |
|------------------------------|----------------------|--|-------------------------------|
| ID | <input type="text"/> | INVOICE EMAIL FROM | <input type="text"/> |
| ACTIVE | Yes | PRINT SEQUENCE | Invoice Number |
| NAME | <input type="text"/> | INVOICE LOGO | Select Image BROWSE... |
| DIVISION | <input type="text"/> | UPLOADED INVOICE LOGO | <input type="text"/> |
| TYPE | <input type="text"/> | INVOICE LOGO 2 | Select Image BROWSE... |
| FREQUENCY | <input type="text"/> | UPLOADED INVOICE LOGO 2 | <input type="text"/> |
| INVOICE FORMAT | <input type="text"/> | BILLING AUTO PAY PROCESS DATE | <input type="text"/> |
| BILLING EXPORT FORMAT | <input type="text"/> | SCHEDULED AUTO PAY TIME | 12:00:00.000 AM |
| CUSTOMER PORTAL URL | <input type="text"/> | ONE INVOICE PER | Disabled |
| PAPER BILL FEE CHARGE CODE | <input type="text"/> | DISABLE AUTOMATIC BILLING BATCH CREATION | No |
| PAPER BILL FEE (PER INVOICE) | <input type="text"/> | DISABLE EMAIL INVOICE AS AN ATTACHMENT | No |

SAVE

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 <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> | A descriptive 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> | How the Bill Group is billed: <ul style="list-style-type: none"> • Advance - Bill ahead for pending services. • Arrears - Bill after service is complete. |
| Frequency <i>Required</i> | 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 <i>Required</i> | 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. <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> |
| 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. <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. |
| 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. |
| 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*.

ADD BILL GROUP ? X

Settings **Notifications** Messages and Text Minimum Amount Rules Catch Up Billing

NOTIFICATION TEMPLATE (INVOICE AS LINK) X

NOTIFICATION TEMPLATE (INVOICE AS ATTACHMENT) X INCLUDE WORK ORDER IMAGES / ATTACHMENTS No

INVOICE DUE REMINDER TEMPLATE X DAYS 5

UNREAD INVOICE REMINDER TEMPLATE X DAYS 7

STATEMENT NOTIFICATION TEMPLATE X

PAST DUE EMAIL FROM MINIMUM INVOICE AMOUNT

PAST DUE NOTICE 1 NOTIFICATION TEMPLATE X DAYS 30

PAST DUE NOTICE 2 NOTIFICATION TEMPLATE X DAYS 60

PAST DUE NOTICE 3 NOTIFICATION TEMPLATE X DAYS 90

PAST DUE NOTICE 4 NOTIFICATION TEMPLATE X DAYS 120

PAST DUE NOTIFICATION MESSAGE

SAVE

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 '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 Minimum Amount Rules tab, set restrictions or criteria for when an invoice will be printed and when invoice notifications will be sent based on the invoice amount.

UPDATE BILL GROUP ✕

Settings Notifications Messages and Text **Minimum Amount Rules** Catch Up Billing

Print Rules - Invoice will be printed if:

INVOICE AMOUNT GREATER THAN

INVOICE BALANCE GREATER THAN

ACCOUNT BALANCE GREATER THAN

Notification Rules - Invoice notification will be sent if:

INVOICE AMOUNT GREATER THAN

INVOICE BALANCE GREATER THAN

ACCOUNT BALANCE GREATER THAN

* Leave the field blank/null and the associated rule will not apply

Save

Field Descriptions

| Fields | Descriptions |
|--|---|
| Print Rules - Invoice will be printed if: | |
| Invoice Amount Greater Than | Invoice will be printed only if the invoice amount is greater than the amount entered here. |
| Invoice Balance Greater Than | Invoice will be printed only if the invoice balance is greater than the amount entered here. |
| Account Balance Greater Than | Invoice will be printed only if the account balance is greater than the amount entered here. |
| Notification Rules - Invoice notification will be sent if: | |
| Invoice Amount Greater Than | Customer to be notified only if the invoice amount is greater than the amount entered here. |
| Invoice Balance Greater Than | Customer to be notified only if the invoice balance is greater than the amount entered here. |
| Account Balance Greater Than | Customer to be notified only if the account balance is greater than the amount entered here. |

Bill Group: Catch Up Billing Tab

The **Catch Up Billing** tab allows you to set two specific types of charges in addition to your flat rate fees for recurring services: **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.

ADD BILL GROUP

Settings | Notifications | Messages and Text | Minimum Amount Rules | **Catch Up Billing**

INCLUDE MANUAL CHARGES

INCLUDE WORK ORDER CHARGES

SAVE

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.

CREATE ACCOUNT

STATUS: Active | SOURCE: Call In | ACCOUNT DIVISION: QAWASTE | SITE DIVISION: QAWASTE | ACCOUNT CLASS: COMMERCIAL

Service Address

NAME: State Trail Parking
 NAME 2:
 ADDRESS LINE 1: 1594 260th Ave
 ADDRESS LINE 2:
 CITY/STATE/POSTAL CODE: Luck WI 54853
 PHONE: (201) 555-0123
 WEBSITE:
 PO#:
 EPA:
 SIGNATURE REQUIRED: | VIP:

Contact Information

CONTACT NAME: | TITLE: | CONTACT EMAIL:
 CONTACT PHONE: (201) 555-0123 | PHONE TYPE: | BILLING CONTACT:

Billing

BILL GROUP: QA Billing Cycle | SURCHARGE GROUP:
 INVOICE BY EMAIL: | AUTO STATUS UPDATE:
 TERM: Net 20 | APPLY FINANCE CHARGES:
 CREDIT LIMIT: 500

Pathway: Accounts > Add Account

Creating a Billing Batch

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

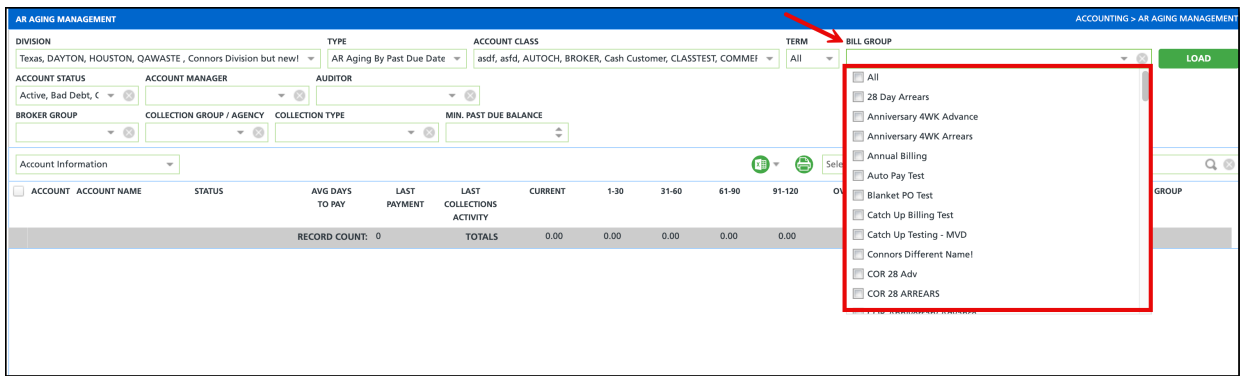
CREATE BILLING BATCH

DIVISION:
 TYPE: All Charges
 BILL GROUP:
 INVOICE DATE:
 Connors Different Name! / Daily / Advance
 MSG II / Anniversary 4 week / Advance
 SCALE CASH / Monthly / Arrears
 Test 21 / Daily / Advance
 Test1212 / Daily / Arrears
 VENDORS / Monthly / Arrears
 CREATE BATCH

Pathway: Accounting > Billing > Select + icon to create

Filtering

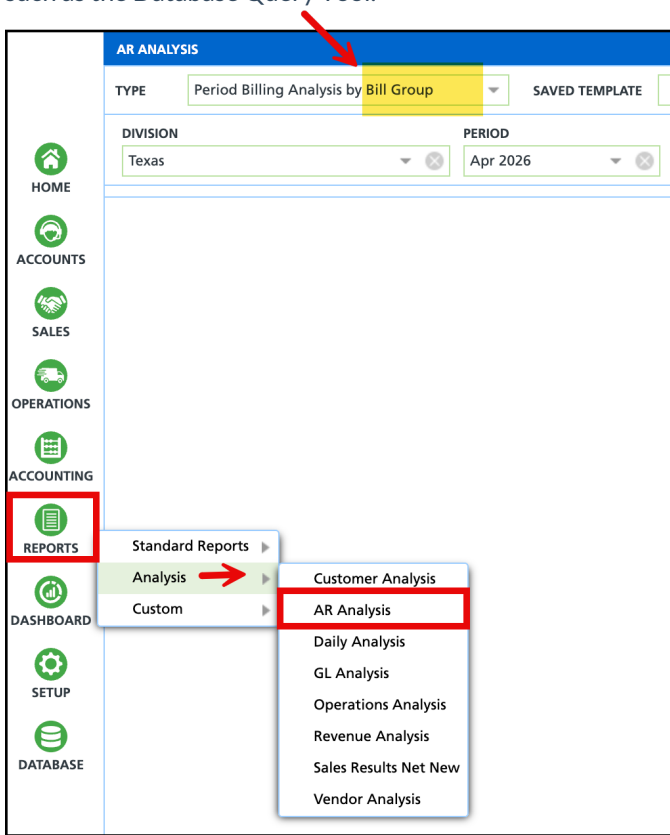
Many of the Accounting screens, provide a Bill Group filter as shown here:



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

Related Articles

[Billing Screen Overview](#)



Settings

Notifications

Messages and Text

Minimum Amount Rules

Catch Up Billing

Print Rules - Invoice will be printed if:

INVOICE AMOUNT GREATER THAN

INVOICE BALANCE GREATER THAN

ACCOUNT BALANCE GREATER THAN

Notification Rules - Invoice notification will be sent if:

INVOICE AMOUNT GREATER THAN

INVOICE BALANCE GREATER THAN

ACCOUNT BALANCE GREATER THAN

* Leave the field blank/null and the associated rule will not apply

Save