Bill Group Setup

Last Modified on 07/17/2025 3:02 pm PDT

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 GR | BILL GROUP SETUP SACCOUNTING > BILL GROUP | | | | | | | | | | | |
|---------|---|-----|--------------------------|------|--------|---------|-----------|------------------|--------|--------------------------------|----------------------|--------|
| • | DIVISION | All | ~ | TYPE | All | * | | | | | | Q |
| ID | | | NAME | DI | VISION | TYPE | FREQUE | NCY INVOICE FO | ORMAT | NOTIFICATION TEMPLATE | INVOICE EMAIL FROM | ACTIVE |
| 1 | | | COR-Q1-JAN-APR-JUL-OCT | С | ORPUS | Advance | Quarte | rly Format | 17 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 10 | | | DAY-Q1-JAN-APR-JUL-OCT | D | AYTON | Advance | Quarte | erly Navu Base P | rodu | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 11 | | | DAY-Q2-FEB-MAY-AUG-NOV | D | AYTON | Advance | Quarte | erly Old Form | at 17 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 112233 | | | Test | D | AYTON | Arrears | Every 2 V | Veeks FCC Invoi | ice 1 | | | No |
| 12 | | | DAY-Q3-MAR-JUN-SEP-DEC | D | AYTON | Advance | Quarte | rly Approved S | tora | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 1222313 | 3 | | Test 2 | Q | AWASTE | Advance | Mont | nly AJM Invo | vice 1 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 13 | | | DAY-RESI MONTHLY ADVANCE | D | AYTON | Advance | Mont | nly Navu Base P | rodu | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 14 | | | DAY-COMM MONTHLY ADVANC | E D | AYTON | Advance | Mont | nly Direct Waste | e Inv | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 15 | | | DAY-COMM MONTHLY ARREAR | s d | AYTON | Arrears | Mont | nly E360 Invo | oice4 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 16 | | | DAY-COMM MONTHLY CURRENT | T D | AYTON | Arrears | Mont | nly Jetaway Sca | le In | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 17 | | | DAY-ROLF BI-WEEKLY | D | AYTON | Arrears | Twice a n | onth Delta Waste | e Inv | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 18 | | | DAY-ROLF MONTHLY | D | AYTON | Arrears | Mont | nly Format | 17 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 19 | | | DAY-ROLF LIBERTY | D | AYTON | Arrears | Mont | nly Format | 17 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 2 | | | COR-RESI MON CURRENT | C | ORPUS | Arrears | Mont | nly Format | 17 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 20 | | | DAY-MANUAL INVOICES | C | ORPUS | Arrears | Mont | nly Format | 17 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 21 | | | DAY-CREDIT HOLD | D | AYTON | Arrears | Mont | nly Format | 17 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 22 | | | DAY-BAD DEBT \ INACTIVE | D | AYTON | Arrears | Mont | nly Format | 17 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 23 | | | HOU-COMMERCIAL ARREARS | н | OUSTON | Arrears | Mont | nly Delta Waste | e Inv | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 24 | | | HOU-RO ARREARS | н | OUSTON | Arrears | Mont | nly Tiger Sanita | tion | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 25 | | | HOU-MANUAL INVOICES | н | OUSTON | Arrears | Mont | nly Format | t 9 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 26 | | | HOU-Q1-JAN-APR-JUL-OCT | н | OUSTON | Advance | Quarte | rly Format | 11 | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 27 | | | HOU-Q2-FEB-MAY-AUG-NOV | н | OUSTON | Advance | Quarte | rly | | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 28 | | | HOU-Q3-MAR-JUN-SEP-DEC | н | OUSTON | Advance | Quarte | rly | | @@division.dbaname;; Invoice # | billing@navusoft.com | Yes |
| 29 | | | BULK EMAIL | Q | AWASTE | Arrears | Mont | nly Format | 17 | | billing@navusoft.com | No |
| 3 | | | COR-COMM MON ADVANCE | С | ORPUS | Advance | Mont | nly 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 | | | | | | | |
|--------------------------------|---------|--|---------------------|--|--|--|--|
| Settings Notifications | | | | | | | |
| ID | | INVOICE EMAIL FROM | | | | | |
| ACTIVE | Yes 💌 | PRINT SEQUENCE | Invoice Number 👻 | | | | |
| NAME | | INVOICE LOGO | Select Image BROWSE | | | | |
| DIVISION | - × (8) | UPLOADED INVOICE LOGO | | | | | |
| ТҮРЕ | • | INVOICE LOGO 2 | Select Image BROWSE | | | | |
| FREQUENCY | • | UPLOADED INVOICE LOGO 2 | | | | | |
| INVOICE FORMAT | • | WORK ORDER HEADER TEXT | | | | | |
| BILLING EXPORT FORMAT | ~ | SURCHARGE HEADER TEXT | | | | | |
| CUSTOMER PORTAL URL | | FINANCE CHARGES TEXT | Finance Charges | | | | |
| INVOICE MESSAGE | | BILLING AUTO PAY PROCESS DATE | - × (8) | | | | |
| | | SCHEDULED AUTO PAY TIME | 12:00 AM 👻 | | | | |
| | | PAPER BILL FEE CHARGE CODE | - 🛞 | | | | |
| | | PAPER BILL FEE (PER INVOICE) | | | | | |
| | | MINIMUM INVOICE AMOUNT TO BE NOTIFIED | 0.00 | | | | |
| MESSAGE DUE IN PAST 01-90 DAYS | | MINIMUM ACCOUNT BALANCE TO BE NOTIFIED | 0.00 | | | | |
| MESSAGE DUE IN PAST 91 DATS | | ONE INVOICE PER | Disabled 👻 | | | | |
| | | DISABLE AUTOMATIC BILLING BATCH CREATION | No 👻 | | | | |
| | | | | | | | |
| | | SAVE | | | | | |

Settings Field Descriptions

| Fields | Descriptions |
|-------------------------|---|
| ID | The ID for the Bill Group. |
| Required | 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 | 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 | Indicates if accounts assigned the Bill Group are billed in advance or behind. Advance - Bill ahead for pending services. Arrears - Bill after service is complete. |
| Frequency Required | 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. Related Documentation: Anniversary 4 Week Billing (28 Day) |

| 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: | Enter a custom message into the Message Due fields that will display on invoices |
| Past 1- 30 Days | of supported formats. |
| Past 30 - 60 Days | |
| Past 61 - 90 Days | |
| Past 91 Days | |
| 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. 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 | The time of day auto pay is processed for accounts belonging to the bill group. |
| Time | 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. |
| 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: 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 | | | | | | |
|--|---|-------------------------|--|--|--|--|
| Settings Notifications | | | | | | |
| NOTIFICATION TEMPLATE (INVOICE AS LINK) | - 8 | 3 | | | | |
| NOTIFICATION TEMPLATE (INVOICE AS ATTACHMENT) | - × (8) | 3 | | | | |
| INVOICE DUE REMINDER TEMPLATE | • 🛞 | DAYS 5 | | | | |
| UNREAD INVOICE REMINDER TEMPLATE | - · · · · · · · · · · · · · · · · · · · | DAYS 7 | | | | |
| STATEMENT NOTIFICATION TEMPLATE | - · · · · · · · · · · · · · · · · · · · | 3 | | | | |
| PAST DUE EMAIL FROM | | MINIMUM PAST DUE AMOUNT | | | | |
| PAST DUE NOTICE 1 NOTIFICATION TEMPLATE | - × (8) | DAYS 30 | | | | |
| PAST DUE NOTICE 2 NOTIFICATION TEMPLATE | - × (8) | DAYS 60 | | | | |
| PAST DUE NOTICE 3 NOTIFICATION TEMPLATE | - × (8) | DAYS 90 | | | | |
| PAST DUE NOTICE 4 NOTIFICATION TEMPLATE | - × (8) | DAYS 120 | | | | |
| 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 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. |