

Last Modified on 11/01/2024 9:28 am PDT

This article details the setup to enable the Paper Bill Fee feature.

PO BOX 12435 (0) USTOR, YX 7224-1158 (0) USTOR, YX 7224-1158 (0) USTOR, YX 7224-1158 (0) USTOR, YX 7224-1158       Active PO BOX 25535400 (0) USTOR XX 7225-1360 (0) USTOR, XX 725-1260 (0) USTOR, XX 725-1260 (0) USTOR, XX 725-1260 (0) USTOR, XX 725-1260 (0) USTOR, XX 725-1260 (	<b>4</b> 3243 N	lavusoft Waste						43243001
	5) P F	PO BOX 12345 HOUSTON, TX 77254-1 B) +1 555-555-4360 O) +1 555-555-4360	1158	<u>Active</u> DIVISION ACCOUNT MGR	HOUSTON House Acct non Syster	n - House Account (Sales	)	<u>1 of 1</u>
Implementation       CA Waste Services - HOUSTON PO BOX 260310-D Dayton OH 45134		ERMS [ NVOICE DELIVERY F APER BILL FEE 5	Due upon receipt Printed \$ 4.95	CLASS BILL GROUP ARREARS - MONTHLY NEXT INVOICE DATE OLD ID COLLECTION AGENT SOURCE REBATE PAYMENT	HOU-COMMERCIAL AI Billed Thru Date Jan 3 Jul 05, 2024 BATCH-25 PRLD-95 House Acct non Syster null Not Applicable	RREARS 1, 2024 874 (not started) n - House Account (Sales	)	
INCHLIGHTS       PO BOX 260310-D Dayton OH 45134       INVOICE DATE       Jan 1, 2023         Active SERVE       Active SERVE       Jan 21, 2023         Active SERVE       2 8 Y4       NAVUSOFT WASTE       BALANCE FWD       \$ 874.21         PO BOX 541158, HOUSTON TX 77254-1158       PO BOX 541158, HOUSTON TX 77254-1158       \$ 874.21       S 860.26         Site 43243001 - BRAZORIA PLACE MOBILE HOME PAR - 2201 ODAY RD       S 874.21       BALANCE DUE       \$ 874.21         Reference       DATE       DESCRIPTION       QTY       UNIT RATE       TOTAL         12/01/22 - 12/31/22       8 Yard Trash Service       2.00       349.14       698.28         01/01/23       Paper Bill Fee - Commercial       1.00       4.95       4.95         01-01-23       Pearland Franchise Fee       104.74       W	Γ	<u>مم</u>	QA	Waste Services - HOUSTON	CUSTOME	<b>R NO</b> 432	43	
Dayton OH 45134         INVOICE NO       860419         Due DATE       Jan 21, 2023         Account is sig         Account is sig         Account is sig         Account is sig         QTY SER         Z       BALANCE FWD       \$ 874.21         NAVUSOFT WASTE         PO BOX 541158,         HOUETON TX 77254-1158         Site 43243001 - BRAZORIA PLACE MOBILE HOME PAR - 2201 ODAY RD         Reference       DATE       DESCRIPTION       QTY       UNIT RATE       TOTAL         12/01/22 - 12/31/22       8 Yard Trash Service       2.00       349.14       698.28       01/01/23       Paper Bill Fee - Commercial       1.00       4.95 <t< td=""><td></td><td><b>Q</b>A</td><td>PO</td><td>BOX 260310-D</td><td>INVOICE D</td><td>ATE Jan</td><td>1, 2023</td><td></td></t<>		<b>Q</b> A	PO	BOX 260310-D	INVOICE D	ATE Jan	1, 2023	
• Account is signed and the service s	HIGHLIGHTS	•	Day	yton OH 45134	INVOICE N	<b>O</b> 8604	419	
▲ ACTIVE SERVIC       ■	Account is sig				DUE DATE	Jan	21, 2023	
QTY SER       BALANCE FWD       \$ 874.21         PAYMENTS       \$ 869.26         CALENDAR       PO BOX 541158, HOUSTON TX 77254-1158       \$ 0.00         CHARGES       \$ 874.21         BALANCE DUE       \$ 874.21         WW       Site 43243001 - BRAZORIA PLACE MOBILE HOME PAR - 2201 ODAY RD         Reference       DATE       DESCRIPTION         Q1/01/22       8 Yard Trash Service       2.00       349.14       698.28         Q1/01/23       Paper Bill Fee - Commercial       1.00       4.95       4.95         Q1-01-23       Pearland Franchise Fee       104.74       Taxes       66.24								
	QTY SERV				BALANCE	FWD	\$ 874.21	
NAVUSOFT WASTE         CREDITS         \$ 0.00           PO BOX 541158, HOUSTON TX 77254-1158         CHARGES         \$ 874.21           BALANCE DUE         \$ 874.21           WW         Taxes           12/01/22 · 12/31/22 · 8 Yard Trash Service         2.00           01/01/23 · Paper Bill Fee · Commercial         1.00           01/01/23 · Pearl Bill Fee · Commercial         1.00           01/01/23 · Pearl Bill Fee · Commercial         1.00           Taxes         66.24	+ 2 8 Ya				PAYMENT	s	\$ 869.26	
Site 43243001 - BRAZORIA PLACE MOBILE HOME PAR - 2201 ODAY RD           Reference         DATE         DESCRIPTION         QTY         UNIT RATE         TOTAL           12/01/22 - 12/31/22         8 Yard Trash Service         2.00         349.14         698.28         01/01/23         Paper Bill Fee - Commercial         1.00         4.95         4.95         01.01.23         Pearland Franchise Fee         104.74         W		NAVUS	OFT WASTE		CREDITS		\$ 0.00	
BALANCE DUE       \$ 874.21         BALANCE DUE       \$ 874.21         W         Site 43243001 - BRAZORIA PLACE MOBILE HOME PAR - 2201 ODAY RD         Reference       DATE       DESCRIPTION       QTY       UNIT RATE       TOTAL         12/01/22 - 12/31/22       8 Yard Trash Service       2.00       349.14       698.28       698.28       698.28       66.24       W         Taxes       66.24	CALENDAR	PO BOX	( 541158,		CHARGES		\$ 874.21	
W         Site 43243001 - BRAZORIA PLACE MOBILE HOME PAR - 2201 ODAY RD         Reference       DATE       DESCRIPTION       QTY       UNIT RATE       TOTAL         12/01/22 - 12/31/22       8 Yard Trash Service       2.00       349.14       698.28         01/01/23       Paper Bill Fee - Commercial       1.00       4.95       4.95         01-01-23       Pearland Franchise Fee       104.74       W         Taxes       66.24		HOUSTC	ON TX 77254-1158		BALANCE	DUE	\$ 874.21	0
Site 43243001 - BRAZORIA PLACE MOBILE HOME PAR - 2201 ODAY RD         Reference       DATE       DESCRIPTION       QTY       UNIT RATE       TOTAL         12/01/22 - 12/31/22       8 Yard Trash Service       2.00       349.14       698.28         01/01/23       Paper Bill Fee - Commercial       1.00       4.95       4.95         01-01-23       Pearland Franchise Fee       104.74       66.24								w
Reference         DATE         DESCRIPTION         QTY         UNIT RATE         TOTAL           12/01/22 · 12/31/22         8 Yard Trash Service         2.00         349.14         698.28           01/01/23         Paper Bill Fee - Commercial         1.00         4.95         4.95           01-01-23         Pearland Franchise Fee         104.74         w           Taxes         66.24		Site 43243	3001 - BRAZORIA PLA	ACE MOBILE HOME PAR - 2201 OI	DAY RD			
12/01/22 - 12/31/22         8 Yard Trash Service         2.00         349.14         698.28           01/01/23         Paper Bill Fee - Commercial         1.00         4.95         4.95           01-01-23         Pearland Franchise Fee         104.74         w           Taxes         66.24		Reference	DATE	DESCRIPTION	QTY	UNIT RATE	TOTAL	
01/01/23     Paper Bill Fee - Commercial     1.00     4.95     4.95       01-01-23     Pearland Franchise Fee     104.74     w       Taxes     66.24			12/01/22 - 12/31/22	8 Yard Trash Service	2.00	349.14	698.28	
01-01-23 Pearland Franchise Fee 104.74 w Taxes 66.24			01/01/23	Paper Bill Fee - Commercial	1.00	4.95	4.95	
Taxes 66.24			01-01-23	Pearland Franchise Fee			104.74	w
					Taxes		66.24	
Site Total 807.97					Site Total		807.97	
Invoice Total 874.21					Invoice	Total	874.21	

#### Permissions

The following permissions are required:

Permission ID	Permission Name
5	View Account
6	View Site
22	Setup \ Accounting
118	Setup \ Services

## Setup: Charge Codes

### Pathway: Setup > Services > Charge Code

Create a charge code for each line of business where a paper bill fee may apply. Assign this charge code to the applicable Bill Group, and it will display on the relevant printed invoices. More information related to Charge Code Setup can be found here: Charge Code Setup

Charge Code Surcharges Default for Work Types     CHARGE CODE PAPER_COM     NAME Paper Bill Fee - Commercial     Dot Description Paper Bill Fee - Commercial     ENABLE NO CHARGE QUANTITY No     ENABLE NO CHARGE QUANTITY     No     EQUIPMENT TYPE     Commercial     EQUIPMENT TYPE     Commercial     EQUIPMENT TYPE     Commercial     EQUIPMENT TYPE     Commercial     Commercial     EQUIPMENT TYPE     Commercial     Commercial     ENABLE MASL MOOLTARGE QUANTITY     No     ENABLE MASLE MANUAL CHARGE QUANTITY     No        ENABLE MASL MOOR     No </th <th>arge Code Surcharges</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>	arge Code Surcharges							
CHARGE CODE       PAFER_COM       ACTIVE       Yes         NAME       Paper Bill Fee - Commercial       INABLE NO CHARGE QUANTTY       No       Image: Commercial		Default for Wo	rk Types					
NAME Paper Bill Fee - Commercial ENABLE NO CHARGE QUANTITY No Image: Commercial <td>HARGE CODE</td> <td>PAPER_COM</td> <td></td> <td></td> <td>ACTIVE</td> <td>Yes</td> <td></td> <td>٣</td>	HARGE CODE	PAPER_COM			ACTIVE	Yes		٣
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THRESHOLD DIS. RATE ENABLE THRESHOLD No -	RATE INDEX			- 🛞	PRINT LABEL	No		*
	THRESHOLD DIS. RATE	ENABL	E THRESHOLD No	-				

## Setup: Bill Group

#### Pathway: Setup > Accounting > Bill Group

Paper bill fee settings are enabled at the Bill Group level, automatically applying the paper bill fee to accounts in the group when the account's 'Invoice By Email' setting is set to 'No.' In Bill Group Setup, the charge code selected in the **Paper Bill Fee Charge Code** field and the amount entered in the **Paper Bill Fee (Per Invoice)** field are displayed in the account section of the Customer Service screen.

UPDATE BILL GROUP			? 😣
Settings Notifications			
ID	23	INVOICE EMAIL FROM	ar@navusoft.com
ACTIVE	Yes 💌	PRINT SEQUENCE	Invoice Number 🔍
NAME	HOU-COMMERCIAL ARREARS	INVOICE LOGO	Select Image. BROWSE
DIVISION	HOUSTON 👻 🛞	UPLOADED INVOICE LOGO	View
ТҮРЕ	Arrears -	INVOICE LOGO 2	Select Image. BROWSE
FREQUENCY	Monthly -	UPLOADED INVOICE LOGO 2	
INVOICE FORMAT	Format 3 B 👻	WORK ORDER HEADER TEXT	Reference
BILLING EXPORT FORMAT	Frontier CPT -	SURCHARGE HEADER TEXT	Surcharge Fees
CUSTOMER PORTAL URL	https://navuqa-customerportal.n	FINANCE CHARGES TEXT	Finance Charges
MESSAGE DUE IN PAST 1-30 DAYS	Message for invoices due 1-30 da	BILLING AUTO PAY PROCESS DATE	- × (2)
MESSAGE DUE IN PAST 30-60 DAYS	Message for invoices due 31-60 c	SCHEDULED AUTO PAY TIME	03:00:00.000 PM
MESSAGE DUE IN PAST 61-90 DAYS	Message for invoices due 61-90 c		Central Standard Time
MESSAGE DUE IN PAST 91 DAYS	Message for invoices due 91 + da	PAPER BILL FEE CHARGE CODE	Paper Bill Fee - Commer 🔻 🛞
CUSTOM 1	Custom Message 1	PAPER BILL FEE (PER INVOICE)	4.95
CUSTOM 2	Custom Message 2	MINIMUM INVOICE AMOUNT TO BE NOTIFIED	0.00
		MINIMUM ACCOUNT BALANCE TO BE NOTIFIED	0.00

### Example of Bill Group Setup - Setup may vary-

# **Exclude an Account from Paper Bill Fee**

## **Pathway:** Load Account > Edit Account (right click within account section)

To exclude an account from the paper bill fee, select the 'Exclude Paper Bill Fee' checkbox in the Edit Account popup editor within Customer Service screen.

PO BOX 1234 Active	
Image: Solution of Construction         Image: Solution of Construction of Con	ount (Sales)
TERMS Due upon receipt BILL GROUP HOLL-COMMERCIAL AREARS	
INVOICE DELIVERY Printed ARREARS - MONTHLY Billed Thru Date Jan 31, 2024	
PAPER BILL FEE \$ 4.95 Right-click NEXT INVOICE DATE Jul 05, 2024 BATCH-25874 (not start	ed)
C Edit OLD ID PRLD-95	
COLLECTION AGENT House Acct non System - House Acct	ount (Sales)
Source null	
REBATE PAYMENT Not Applicable	
EDIT ACCOUNT	3 ⊗
CURRENT Account Settings	
BILL GROUP HOUSE COMMERCIAL ARGENCE & BILL BY SI	
Arrears - Monthly Billed Thru Date Jan 31, 2024 Next Invoice Date Jul 05, 2024 BATCH-25874 (not started)	APPLY FINANCE CHARGES
Account is significantly past due     INVOICE BY EMAIL     No     EXCLUDE F	FROM PAYMENT PROCESSING FEE
▲ ACTIVE SERVICES (1) Notes TERM Due upon receipt ✓ EXCLUD	E FROM PAST DUE NOTIFICATION
QTY SERVICE CODE CREDIT LIMIT	IIDE WORK ORDER FORMAT RATE
	INBOUND ORDER AUTO PRINT
AP	
SUN DEFAULT PAYMENT METHOD Not Applicable * PAYEE NAME	1099 D
	sw
WARNING ON OPEN	
SAVE	SVV.
SAVE	