Billing Screen Overview

Pathway: *Accounting > Billing*

The Billing screen in the Accounting module simplifies the billing process and keeps a historical record of all billing batches. Within the Pending and In Process tab, two distinct grids are available: the upper grid shows individual billing batches, while the lower grid provides an analysis of the selected batch.
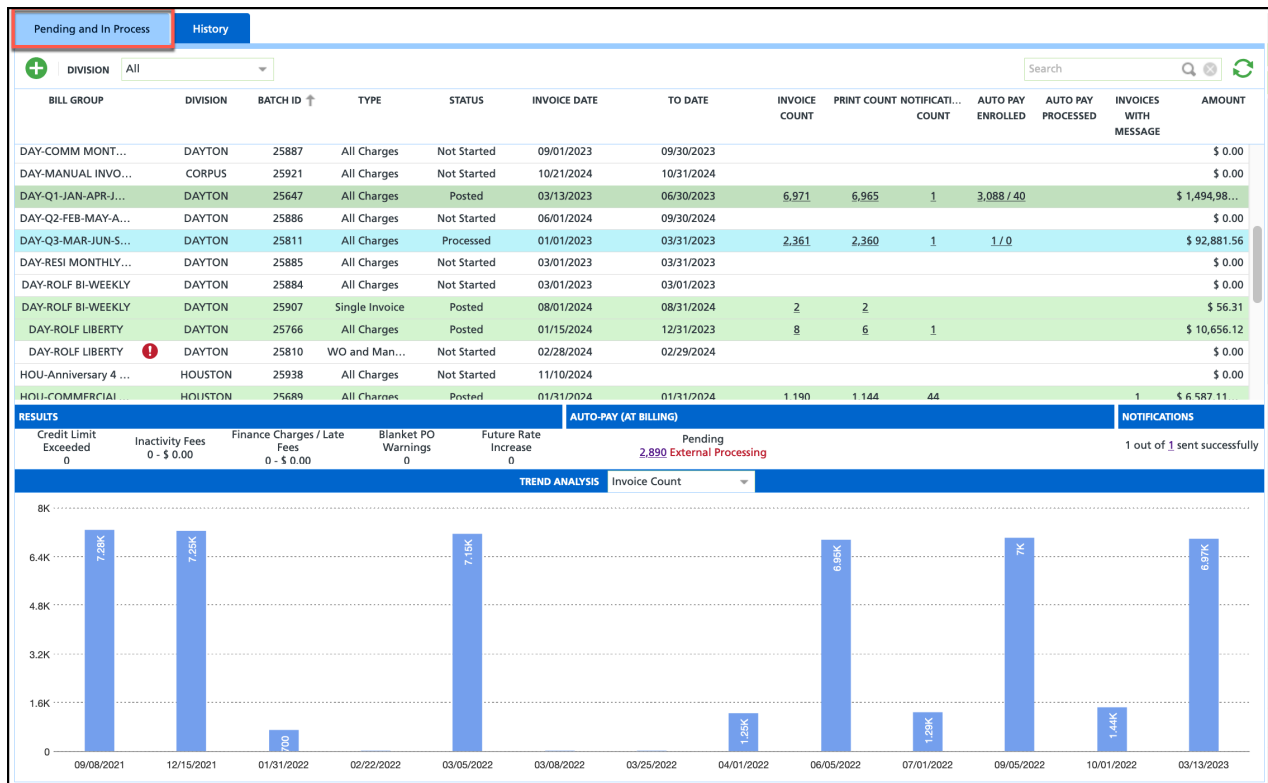

Permissions:

The following permissions are required to view, create and post Billing Batches:

Permission ID	Permission Name
109	View Billing
110	Add Billing Batch
111	Post Billing Batch

Screen Descriptions - Pending and In Process

Upper Grid	
Field	**Description**
Add Icon	Select to create a new billing batch.
Division Filter	Filters the screen to only display batches of the selected division.
Bill Group	Identifies the bill group the billing batch is for. A red warning icon is displayed if the Bill Group includes omitted divisions. Hover your mouse over the icon to review which division are omitted from the batch. The right click menu option to omit a division from a batch is only available if the following two conditions are met: 1. In *Setup > System > System Options > Account (tab),* the 'Limit Bill Group to Single Division' field must be 'No'. 2. The billing batch must be in a "Not Started" status.
Division	Identifies the division the billing batch is associated to.
Batch ID	Displays the ID assigned to the batch when it was created.
Type	Indicates if the billing batch was for 'All Charges', or 'WO and Manual Charges Only.'

Status	Displays the current status of the batch. Additionally, the background color of a batch also reflects its status. • White = Not Started • Blue = Processed • Green = Posted
Invoice Date	Displays the invoice date that was entered when the batch was created.
To Date	Refers to the date for which the customer is being billed for services and equipment through.
Invoice Count	Displays a total count of invoices the billing batch created. Click the hyperlink value to open the Billing Details popup window for the batch.
Print Count	Displays a total count of invoices that have been printed for the billing batch. Click the hyperlink value to open the Billing Details popup window for the batch.
Notification Count	Displays the count of invoices that were emailed to the customer. Click the hyperlink value to open the Invoice Notification Summary popup window for the batch.
Auto Pay Enrolled	Indicates how many accounts are enrolled in auto pay. The first number (**xx** /xx) represents the amount of accounts pending automatic payment. The second number (xx/**xx**) represents the amount of accounts enrolled in a future scheduled auto pay. Click the hyperlink value to open the Auto Pay Invoices popup window for the batch.
Auto Pay Processed	Displays a count of invoices that have been processed at the time of billing.
Invoices With Message	If a message was added to the batch, the count of invoices it will be added to is displayed. To add a message, right click on the batch and select 'Add Message.' This is replaced by 'Edit Message' once a message has been added.
Amount	Calculation of the total amount the batch is billing for.
Lower Grid - Results	
Field	**Description**
Credit Limit	The hyperlink displays a count of accounts where the credit limit has been exceeded. Select the link to open the Exceeded Credit Limit Accounts and view a list of these accounts.
Inactivity Fees	The hyperlink displays a count of accounts with applied inactivity fee charges. Select the link to open the Charges window and view a list of accounts along with their charge details.
Finance Charges / Late Fees	The hyperlink displays a count of accounts with applied finance charges or late fees. Select the link to open the Charges window and view a list of accounts along with the details of the late fees/finance charges.
Blanket PO Warnings	Displays a count of blanket purchase orders where the amount being billed for exceeds the blanket purchase order's capped/authorized amount. More information about the blanket purchase orders can be found here: Add Photos, Attachments and Blanket Purchase Orders to Accounts.

Future Rate Increase	The hyperlink displays a count of invoices affected by a recurring rate increase where the effective date is greater than the billing invoice date, the rate increases and the batch status is open, in progress or posted. Rate increases are applied in Sales > Rate Update Batches. Select the link to open the Future Rate Increase Invoices window and add an optional message to display on the invoices of the affected accounts.
Lower Grid - Auto Pay (At Billing)	
Field	**Description**
Pending	The hyperlink displays a count of accounts enrolled in auto-pay with pending payments. Review these accounts by selecting the link to open the Auto Pay Invoices screen.
Expired	The hyperlink displays a count of accounts enrolled in auto-pay but with expired credit cards on file. Select the link to open the Auto Pay Invoices screen and view a list of these accounts.
Declined	The hyperlink displays a count of accounts enrolled in auto-pay that have experienced payment declines. Review these accounts by selecting the link to open the Auto Pay Invoices screen.
Processed	The hyperlink displays a count of accounts that have been processed by auto-pay. Review these accounts by selecting the link to open the Auto Pay Invoices screen.
Lower Grid - Notifications and Trend Analysis	
Notifications	The hyperlink displays a count of accounts that have received an invoice notification. Review these accounts by selecting the link to open the Invoice Notification Summary.
Trend Analysis	The selected Trend Analysis displays a bar graph. Analysis options include: • Invoice Count • Billed Amount • WO Charges • Recurring • Surcharges • Taxes • Emailed • New Business • Lost Business • Increases • Decreases

Screen Description - History

Filter	Description
Division	Filters the screen to only display billing batches of the selected division.
Bill Group	Filters the screen to only display billing batches of the selected bill group.
Type	Filters the screen to only display billing batches that are scheduled, not scheduled or single invoice billed.
Year	Filter the screen to limit what is returned to the selected year.

Field	Description
Batch ID	Displays the ID assigned to the batch when the batch was created.
Division	Displays the division the batch belongs to.
Type	Indicates if the batch was scheduled, not scheduled or a single invoice.
Status	Specifies whether the batch status was "Completed" or "Voided."
Invoice Date	Refers to the specific date when an invoice is issued or created.
From-To Date	Refers to the window of time services and charges are being billed for.
Invoice Count	Indicates how many invoices were created by the billing batch.
Amount	Displays the total amount being invoiced for in the batch.
Created By	Displays the user name and timestamp of who created the batch.
Completed/Voided By	Displays the user name and timestamp of who posted or voided the batch.

Related Articles

Create a Billing Batch
Pre-Billing Workflow
Billing - Process and Post a Billing Batch