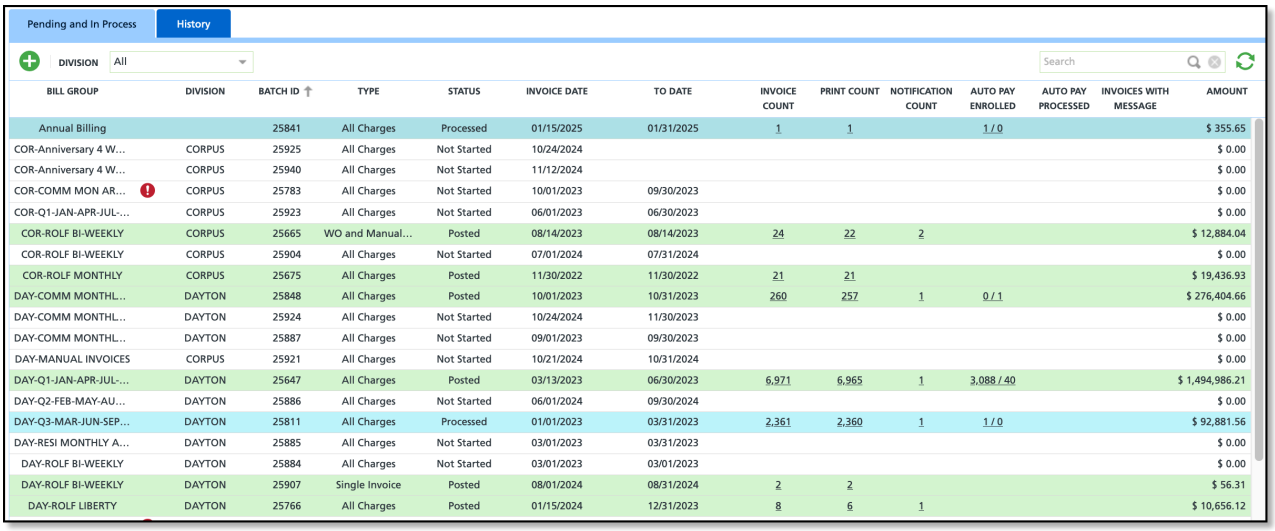
Billing Screen Overview

Last Modified on 06/26/2026 2:00 pm PDT

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.



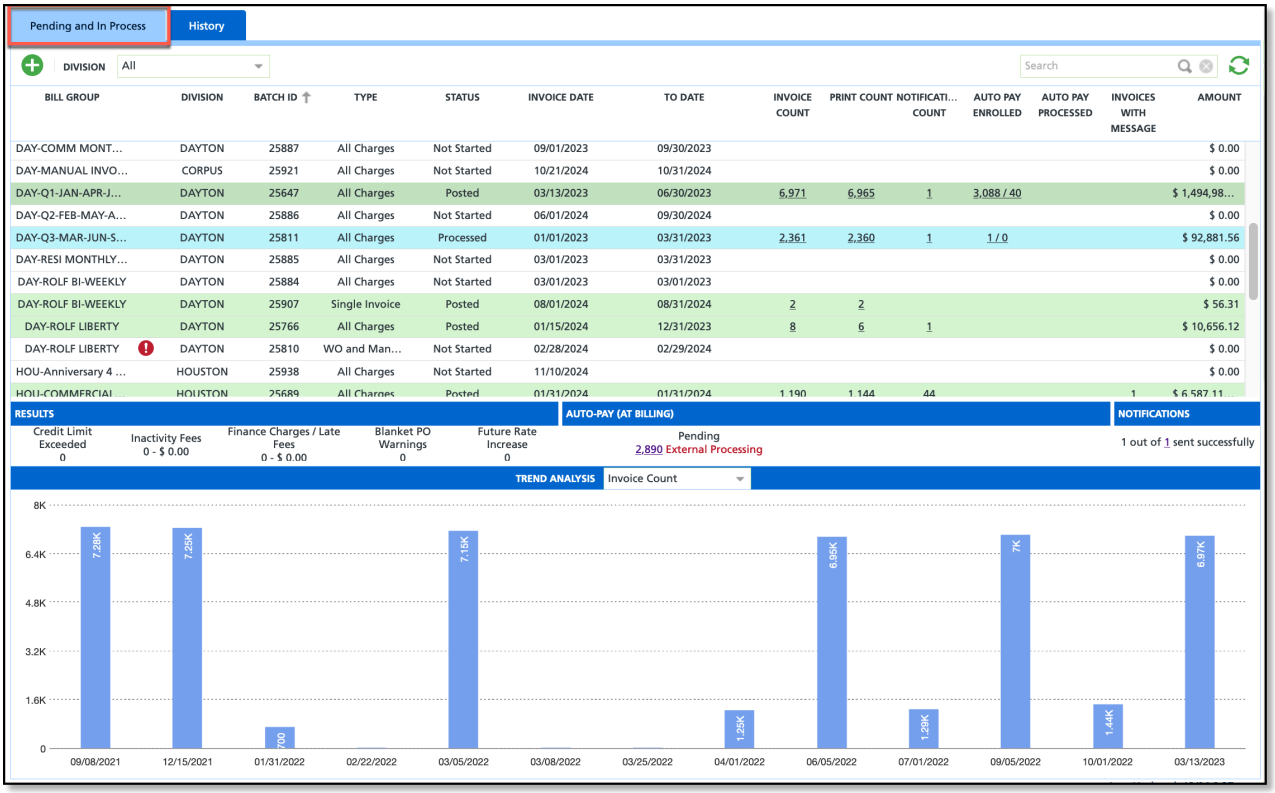
BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	INVOICE DATE	TO DATE	INVOICE COUNT	PRINT COUNT	NOTIFICATION COUNT	AUTO PAY ENROLLED	AUTO PAY PROCESSED	INVOICES WITH MESSAGE	AMOUNT
Annual Billing		25841	All Charges	Processed	01/15/2025	01/31/2025	1	1		1 / 0			$ 355.65
COR-Anniversary 4 W...	CORPUS	25925	All Charges	Not Started	10/24/2024								$ 0.00
COR-Anniversary 4 W...	CORPUS	25940	All Charges	Not Started	11/12/2024								$ 0.00
COR-COMM MON AR...	CORPUS	25783	All Charges	Not Started	10/01/2023	09/30/2023							$ 0.00
COR-Q1-JAN-APR-JUL-...	CORPUS	25923	All Charges	Not Started	06/01/2023	06/30/2023							$ 0.00
COR-ROLF BI-WEEKLY	CORPUS	25665	WO and Manual...	Posted	08/14/2023	08/14/2023	24	22	2				$ 12,884.04
COR-ROLF BI-WEEKLY	CORPUS	25904	All Charges	Not Started	07/01/2024	07/31/2024							$ 0.00
COR-ROLF MONTHLY	CORPUS	25675	All Charges	Posted	11/30/2022	11/30/2022	21	21					$ 19,436.93
DAY-COMM MONTHL...	DAYTON	25848	All Charges	Posted	10/01/2023	10/31/2023	260	257	1	0 / 1			$ 276,404.66
DAY-COMM MONTHL...	DAYTON	25924	All Charges	Not Started	10/24/2024	11/30/2023							$ 0.00
DAY-COMM MONTHL...	DAYTON	25887	All Charges	Not Started	09/01/2023	09/30/2023							$ 0.00
DAY-MANUAL INVOICES	CORPUS	25921	All Charges	Not Started	10/21/2024	10/31/2024							$ 0.00
DAY-Q1-JAN-APR-JUL-...	DAYTON	25647	All Charges	Posted	03/13/2023	06/30/2023	6,971	6,965	1	3,088 / 40			$ 1,494,986.21
DAY-Q2-FEB-MAY-AU...	DAYTON	25886	All Charges	Not Started	06/01/2024	09/30/2024							$ 0.00
DAY-Q3-MAR-JUN-SEP...	DAYTON	25811	All Charges	Processed	01/01/2023	03/31/2023	2,361	2,360	1	1 / 0			$ 92,881.56
DAY-RESI MONTHLY A...	DAYTON	25885	All Charges	Not Started	03/01/2023	03/31/2023							$ 0.00
DAY-ROLF BI-WEEKLY	DAYTON	25884	All Charges	Not Started	03/01/2023	03/01/2023							$ 0.00
DAY-ROLF BI-WEEKLY	DAYTON	25907	Single Invoice	Posted	08/01/2024	08/31/2024	2	2					$ 56.31
DAY-ROLF LIBERTY	DAYTON	25766	All Charges	Posted	01/15/2024	12/31/2023	8	6	1				$ 10,656.12

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

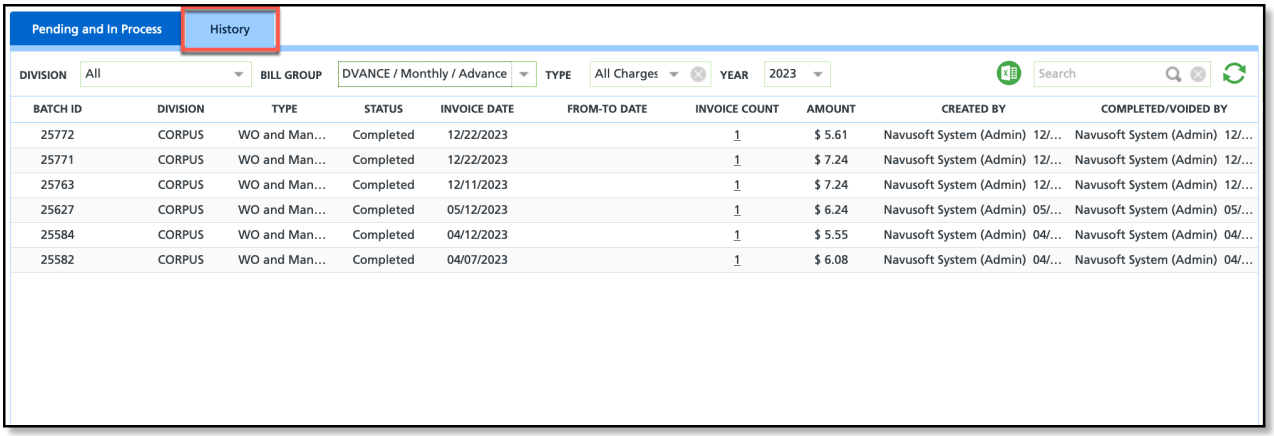


Upper Grid	
Field	**Description**
Add Icon	Select to create a new billing batch.
Division Filter	Filters the screen to only display batches of the selected division.
Bill Group	Identifies the bill group the billing batch is for. A red warning icon is displayed if the Bill Group includes omitted divisions. 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	The division the billing batch is associated to.
Batch ID	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	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	The invoice date that was entered when the batch was created.
To Date	The date for which the customer is being billed for services and equipment through.
Invoice Count	The total count of invoices the billing batch created. Click the hyperlink value to open the Billing Details popup window for the batch.
Print Count	The 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	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	Indications 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	The 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 Exceeded	The number of accounts where the credit limit has been exceeded. Select the hyperlink to open the Exceeded Credit Limit Accounts and view a list of these accounts.
Inactivity Fees	The number of accounts with applied inactivity fee charges. Select the hyperlink to open the Charges window and view a list of accounts along with their charge details.
Finance Charges / Late Fees	The number of accounts with applied finance charges or late fees. Select the hyperlink to open the Charges window and view a list of accounts along with the details of the late fees/finance charges.

Blanket PO Warnings	The number 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 number of accounts affected by a rate increase. Rate increases are applied in Sales > Rate Update Batches. Select the hyperlink 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 External Processing	The number of accounts enrolled in auto-pay with pending payment processing. Review these accounts by selecting the hyperlink to open the Auto Pay Invoices popup window.
Lower Grid - Notifications and Trend Analysis	
Notifications	The number of accounts that have received an invoice notification. Review these accounts by selecting the hyperlink 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	The ID assigned to the batch when the batch was created.
Division	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	The specific date when an invoice is issued or created.
From-To Date	The window of time services and charges are being billed for.
Invoice Count	The number of invoices generated in the batch. Click the hyperlink to open the Billing Details popup window.
Amount	The total amount being invoiced for in the batch.
Created By	The user name and timestamp of who created the batch.
Completed/Voided By	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