

# Billing Screen Overview

Last Modified on 12/01/2025 6:18 am PST

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.

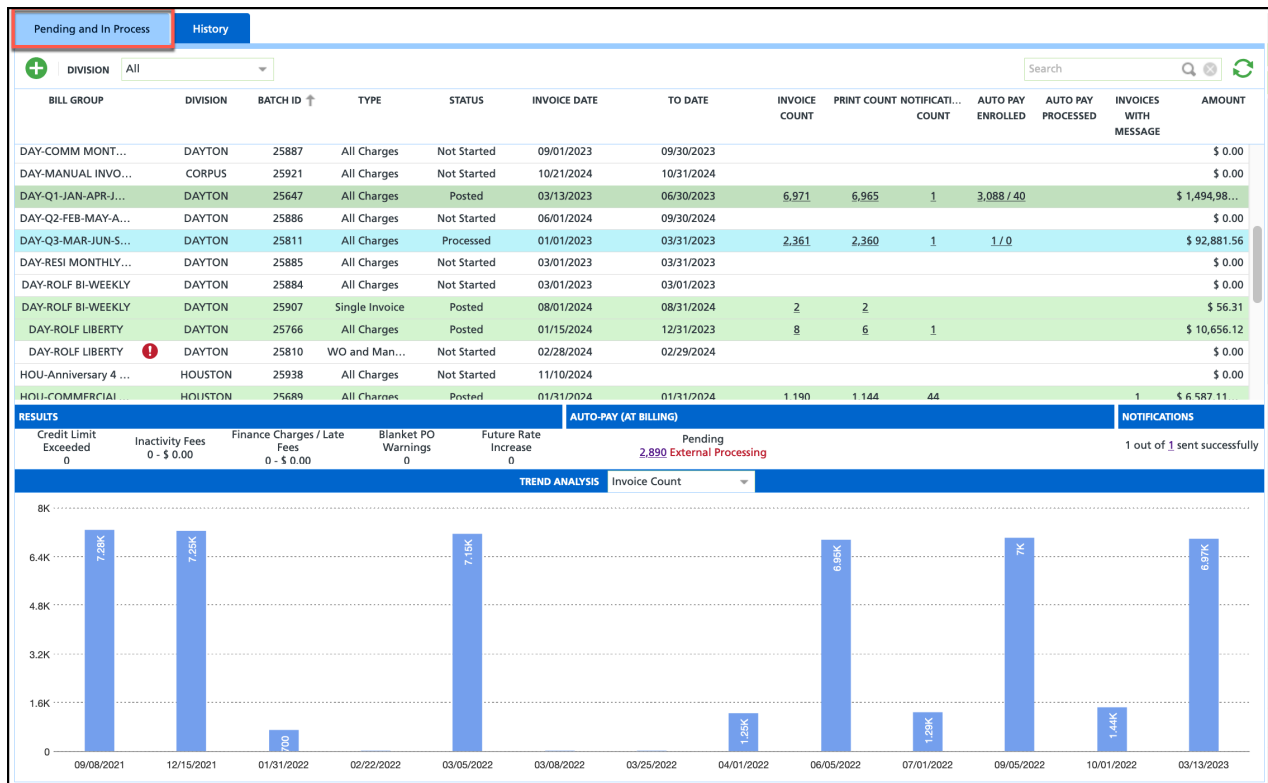
| Pending and In Process |          |            |                  |             |              |            |               |             |                    |                   |                    |                       |                 |
|------------------------|----------|------------|------------------|-------------|--------------|------------|---------------|-------------|--------------------|-------------------|--------------------|-----------------------|-----------------|
| History                |          |            |                  |             |              |            |               |             |                    |                   |                    |                       |                 |
| + DIVISION All         |          |            |                  |             |              |            |               |             |                    |                   |                    |                       |                 |
| Search                 |          |            |                  |             |              |            |               |             |                    |                   |                    |                       |                 |
| 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      | <div>Identifies the bill group the billing batch is for.</div> <div>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:<div><div>1. In Setup &gt; System &gt; System Options &gt; Account (tab), the 'Limit Bill Group to Single Division' field must be 'No'.</div><div>2. The billing batch must be in a "Not Started" status.</div></div></div> |
| 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.'  |

|                                    |  |
|------------------------------------|--|
| <b>Status</b>                      | <p>Displays the current status of the batch. Additionally, the background color of a batch also reflects its status.</p> <ul style="list-style-type: none"> <li>• White = Not Started</li> <li>• Blue = Processed</li> <li>• Green = Posted</li> </ul>   |
| <b>Invoice Date</b>                | Displays the invoice date that was entered when the batch was created.   |
| <b>To Date</b>                     | Refers to the date for which the customer is being billed for services and equipment through.  |
| <b>Invoice Count</b>               | Displays a total count of invoices the billing batch created. Click the hyperlink value to open the Billing Details popup window for the batch.  |
| <b>Print Count</b>                 | 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.   |
| <b>Notification Count</b>          | 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.   |
| <b>Auto Pay Enrolled</b>           | 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. |
| <b>Auto Pay Processed</b>          | Displays a count of invoices that have been processed at the time of billing.  |
| <b>Invoices With Message</b>       | 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.  |
| <b>Amount</b>                      | Calculation of the total amount the batch is billing for.  |
| <b>Lower Grid - Results</b>        |  |
| <b>Field</b>                       | <b>Description</b>   |
| <b>Credit Limit</b>                | 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.   |
| <b>Inactivity Fees</b>             | 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.  |
| <b>Finance Charges / Late Fees</b> | 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.  |
| <b>Blanket PO Warnings</b>         | 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: <a href="#">Add Photos, Attachments and Blanket Purchase Orders to Accounts</a> .                                 |

|  |  |
|--|--|
| <b>Future Rate Increase</b>                          | 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. |
| <b>Lower Grid - Auto Pay (At Billing)</b>            |  |
| <b>Field</b>   | <b>Description</b>   |
| <b>Pending</b>                                       | 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.   |
| <b>Expired</b>                                       | 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.   |
| <b>Declined</b>                                      | 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.  |
| <b>Processed</b>                                     | 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.   |
| <b>Lower Grid - Notifications and Trend Analysis</b> |  |
| <b>Notifications</b>                                 | 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.   |
| <b>Trend Analysis</b>                                | <p>The selected Trend Analysis displays a bar graph. Analysis options include:</p> <ul style="list-style-type: none"> <li>• Invoice Count</li> <li>• Billed Amount</li> <li>• WO Charges</li> <li>• Recurring</li> <li>• Surcharges</li> <li>• Taxes</li> <li>• Emailed</li> <li>• New Business</li> <li>• Lost Business</li> <li>• Increases</li> <li>• Decreases</li> </ul>  |

## Screen Description - History

Pending and In Process

History

DIVISION

All

BILL GROUP

DVANCE / Monthly / Advance

TYPE

Scheduled

YEAR

2023

Search

| BATCH ID | DIVISION | TYPE           | STATUS    | INVOICE DATE | FROM-TO DATE   | INVOICE COUNT | AMOUNT  | CREATED BY                              | COMPLETED/VOIDED BY                     |
|----------|----------|----------------|-----------|--------------|----------------|---------------|---------|---|---|
| 25772    | CORPUS   | Off Scheduled  | Completed | 12/22/2023   |                | 1             | \$ 5.61 | Navusoft System (Inactive) 12/22/202... | Navusoft System (Inactive) 12/22/202... |
| 25771    | CORPUS   | Off Scheduled  | Completed | 12/22/2023   |                | 1             | \$ 7.24 | Navusoft System (Inactive) 12/22/202... | Navusoft System (Inactive) 12/22/202... |
| 25763    | CORPUS   | Off Scheduled  | Completed | 12/11/2023   |                | 1             | \$ 7.24 | Navusoft System (Inactive) 12/11/202... | Navusoft System (Inactive) 12/11/202... |
| 25705    | CORPUS   | Single Invoice | Completed | 09/01/2023   | To: 09/30/2023 | 0             | \$ 0.00 | Matthew Van Doren 10/06/2023 10:5...    | Matthew Van Doren 10/06/2023 10:5...    |
| 25704    | CORPUS   | Single Invoice | Completed | 09/01/2023   | To: 09/30/2023 | 0             | \$ 0.00 | Matthew Van Doren 10/06/2023 10:5...    | Matthew Van Doren 10/06/2023 10:5...    |
| 25703    | CORPUS   | Single Invoice | Completed | 09/01/2023   | To: 09/30/2023 | 0             | \$ 0.00 | Matthew Van Doren 10/06/2023 10:5...    | Matthew Van Doren 10/06/2023 10:5...    |
| 25702    | CORPUS   | Single Invoice | Completed | 10/06/2023   | To: 10/31/2023 | 0             | \$ 0.00 | Matthew Van Doren 10/06/2023 10:5...    | Matthew Van Doren 10/06/2023 10:5...    |
| 25627    | CORPUS   | Off Scheduled  | Completed | 05/12/2023   |                | 1             | \$ 6.24 | Navusoft System (Inactive) 05/11/202... | Navusoft System (Inactive) 05/11/202... |
| 25584    | CORPUS   | Off Scheduled  | Completed | 04/12/2023   |                | 1             | \$ 5.55 | Navusoft System (Inactive) 04/11/202... | Navusoft System (Inactive) 04/11/202... |
| 25582    | CORPUS   | Off Scheduled  | Completed | 04/07/2023   |                | 1             | \$ 6.08 | Navusoft System (Inactive) 04/06/202... | Navusoft System (Inactive) 04/06/202... |

| 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](#)