

Billing Screen Overview

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Pathway: Accounting > Billing

The Billing screen in Navusoft streamlines the billing process and maintains a historical record of billing batches. Within the Billing screen's Pending and In Process tab, there are two separate grids. The upper grid displays individual billing batches, while the lower grid offers an analysis of the selected batch.

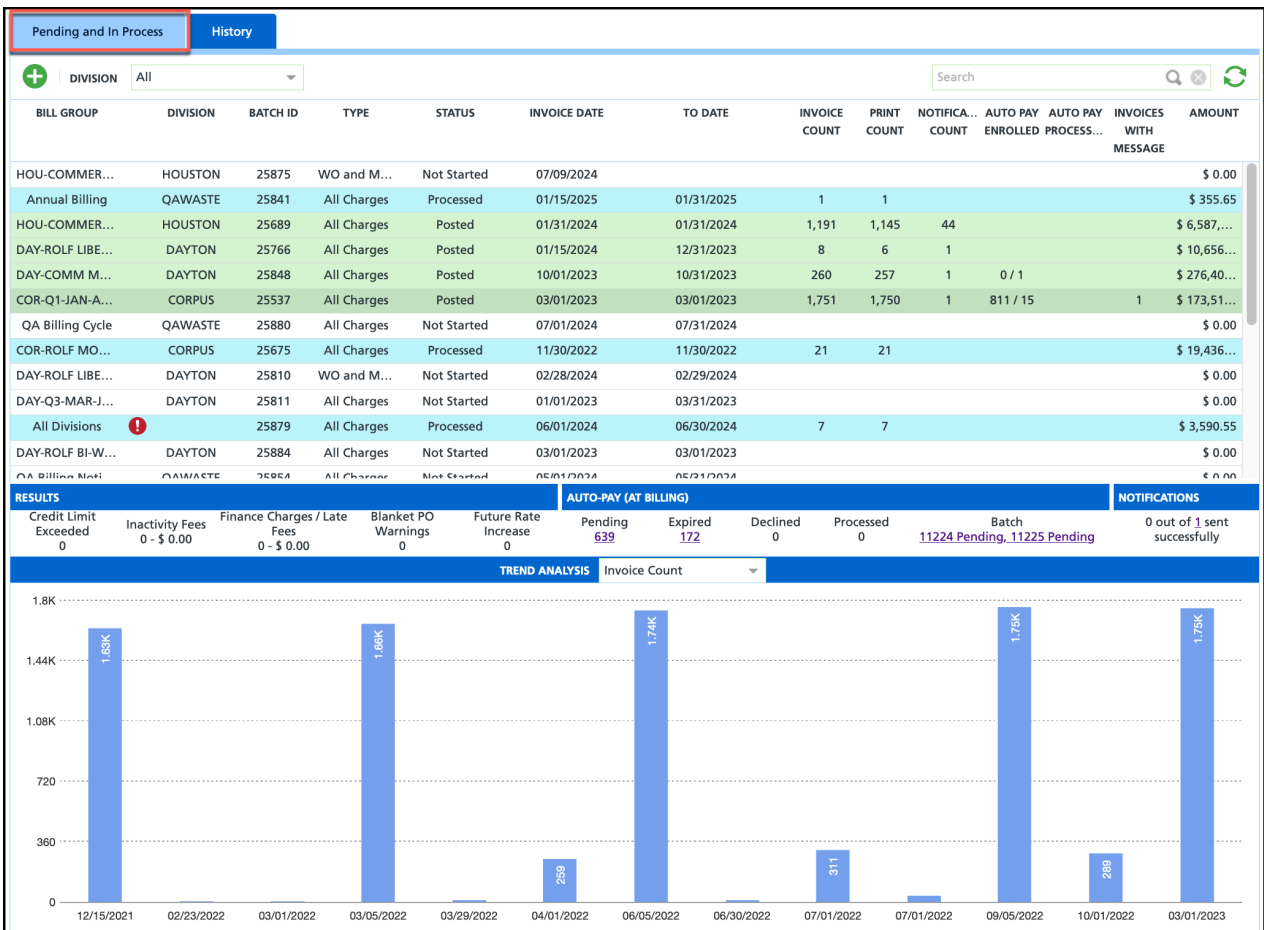
Pending and In Process		History															
+		DIVISION	All											Search	Q	X	R
BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	INVOICE DATE	TO DATE	INVOICE COUNT	PRINT COUNT	NOTIFICA... COUNT	AUTO PAY ENROLLED	AUTO PAY PROCESSED	INVOICES WITH MESSAGE	AMOUNT				
HOU-COMMER...	HOUSTON	25875	WO and M...	Not Started	07/09/2024								\$ 0.00				
Annual Billing	QAWASTE	25841	All Charges	Processed	01/15/2025	01/31/2025	1	1					\$ 355.65				
HOU-COMMER...	HOUSTON	25689	All Charges	Posted	01/31/2024	01/31/2024	1,191	1,145	44				\$ 6,587,...				
DAY-ROLF LIBER...	DAYTON	25766	All Charges	Posted	01/15/2024	12/31/2023	8	6	1				\$ 10,656,...				
DAY-COMM M...	DAYTON	25848	All Charges	Posted	10/01/2023	10/31/2023	260	257	1	0 / 1			\$ 276,40,...				
COR-Q1-JAN-AP...	CORPUS	25537	All Charges	Posted	03/01/2023	03/01/2023	1,751	1,750	1	811 / 15		1	\$ 173,51,...				
QA Billing Cycle	QAWASTE	25880	All Charges	Not Started	07/01/2024	07/31/2024							\$ 0.00				
COR-ROLF MON...	CORPUS	25675	All Charges	Processed	11/30/2022	11/30/2022	21	21					\$ 19,436,...				
DAY-ROLF LIBER...	DAYTON	25810	WO and M...	Not Started	02/28/2024								\$ 0.00				
DAY-Q3-MAR-J...	DAYTON	25811	All Charges	Not Started	01/01/2023	03/31/2023							\$ 0.00				
All Divisions		25879	All Charges	Processed	06/01/2024	06/30/2024	7	7					\$ 3,590.55				
DAY-ROLF BI-W...	DAYTON	25884	All Charges	Not Started	03/01/2023	03/01/2023							\$ 0.00				
QA Billing Notif...	QAWASTE	25854	All Charges	Not Started	05/01/2024	05/31/2024							\$ 0.00				
DAY-Q2-FEB-MA...	DAYTON	25886	All Charges	Not Started	06/01/2024	09/30/2024							\$ 0.00				
DAY-COMM M...	DAYTON	25887	All Charges	Not Started	09/01/2023	09/30/2023							\$ 0.00				
HOU-MANUAL I...	HOUSTON	25869	WO and M...	Posted	06/29/2024	06/01/2024	3	3					\$ 20,373,...				
DAY-RESI MONT...	DAYTON	25885	All Charges	Not Started	03/01/2023	03/31/2023							\$ 0.00				

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	<p>Identifies the bill group the billing batch is for.</p> <p>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:</p> <ol style="list-style-type: none"> In <i>Setup > System > System Options > Account (tab)</i>, the 'Limit Bill Group to Single Division' field must be 'No'. 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	<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"> • 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.
Print Count	Displays a total count of invoices that have been printed for the billing batch.
Notification Count	Displays the count of invoices that were emailed to the customer.
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.
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 accounts affected by a rate increase. 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	<p>The selected Trend Analysis displays a bar graph. Analysis options include:</p> <ul style="list-style-type: none"> • Invoice Count • Billed Amount • WO Charges • Recurring • Surcharges • Taxes • Emailed • New Business • Lost Business • Increases • Decreases

Screen Description - History

Pending and In Process		History							
DIVISION	All	BILL GROUP	DVANCE / Monthly / Advance	TYPE	Scheduled	YEAR	2023	SEARCH	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](#)
