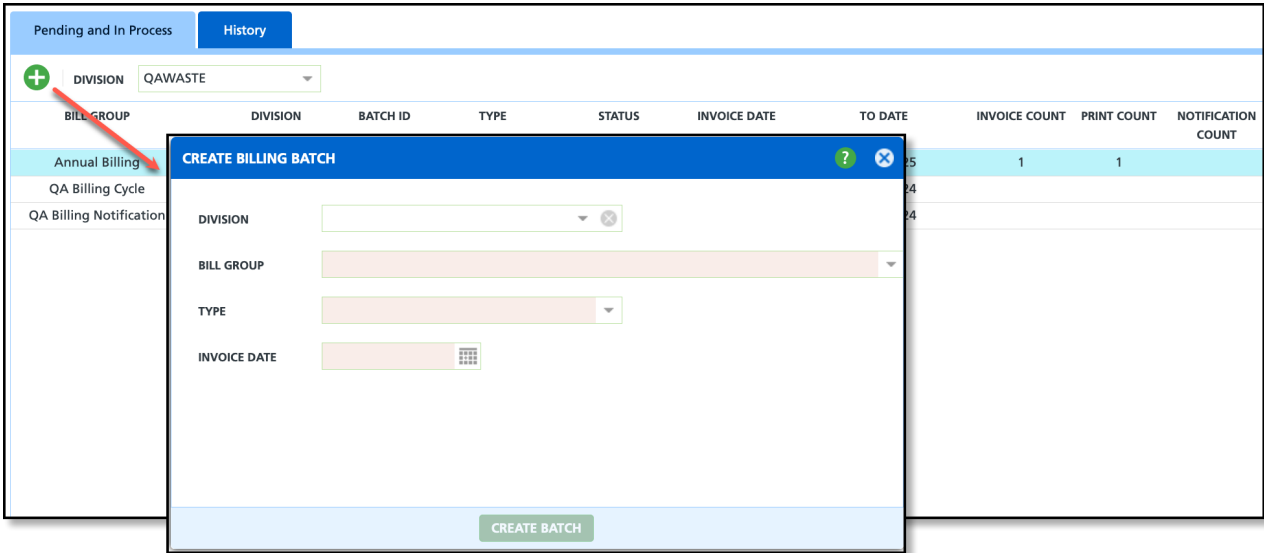


Create a Billing Batch

Last Modified on 11/12/2024 12:50 pm PST

Pathway: *Accounting > Billing*

The Billing Batch screen streamlines the bulk processing of billing transactions within the Navusoft system. This article captures the process of creating a new billing batch.



Permissions

The following permissions are required to create a billing batch:

Permission ID	Permission Name
109	View Billing
110	Add Billing Batch

Field Descriptions

Field	Description
Division	Specifies the division a billing batch is being created for.
Bill Group	Identifies the specific bill group the batch applies to. If the Bill Group is not limited to a single division, but not all divisions should be included in the batch, right-click within the row of the batch and select 'Omit Divisions from Billing Batch' from the menu that displays. This option is only available if the batch status is "Not Started."
Type	Determines what the billing batch will include in the billing cycle. <ul style="list-style-type: none">• All Charges: billing batch will include recurring services, work order charges and manual charges.• Work Order and Manual Charges Only: billing batch will only include work order and manual charges.

Invoice Date	The date when an invoice is issued. This is the 'Bill to Date' for work order and manual charges.
Bill To Date	The date the billing batch is billed through for recurring services. This field only displays if 'All Charges' is the selected Type.

Create a Billing Batch

The screenshot shows a web interface with a modal window titled "CREATE BILLING BATCH". The modal has a blue header with a question mark and a close button. It contains four input fields: "DIVISION" (a dropdown menu), "BILL GROUP" (a dropdown menu), "TYPE" (a dropdown menu set to "All Charges"), and "INVOICE DATE" (a date picker). A green "CREATE BATCH" button is located at the bottom of the modal. In the background, a table is visible with columns "BILL GROUP", "DIVISION", "BATCH ID", and "TYPE". A red arrow points to a green "+" icon in the top left corner of the table area.

1. Open the Create Billing Batch screen by clicking on the green + 'Add' icon.
2. Choose the **Division** for the billing batch.
3. Select the **Bill Group** relevant to the batch.
4. Select the **Type** as 'All Charges' or 'Work Order and Manual Charges Only'.
5. Enter the **Invoice Date** for the billing batch.
6. If 'All Charges' was selected as the Type, enter a **Bill To Date**.
7. Click **Create Batch** upon completing all fields.

Billing Batch - Pending and In Process

After a billing batch has been created, it will display in the *Pending and In Process* tab with a 'Not Started' status. Refer to the [Pre-Billing Workflow](#) article to continue working through the billing process.

Pending and In Process		History											
+		DIVISION	QAWASTE										
										Search	Q	R	
BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	INVOICE DATE	FROM-TO DATE	INVOICE COUNT	PRINT COUNT	NOTIFICATION COUNT	AUTO PAY ENROLLED	AUTO PAY PROCESSED	INVOICES WITH MESSAGE	AMOUNT
QA Billing Cycle	QAWASTE	25789	Scheduled	Not Started	02/01/2024	02/01/2024 - 02/29/2024							\$ 0.00
Annual Billing	QAWASTE	25777	Scheduled	Posted	01/15/2024	01/01/2024 - 01/31/2024	3	2					\$ 990.00

Related Articles:

[Billing Screen Overview](#)

[Pre-Billing Workflow](#)

[Billing - Process and Post a Billing Batch](#)