Export a Billing Batch

Pathway: *Setup > Accounting > Bill Group*

The file format that is used to export a billing batch to a third party mailer is established in Bill Group Setup in the Settings tab. If an export format is not identified for the Bill Group, the system will display an Alert when the user attempts to export the batch.
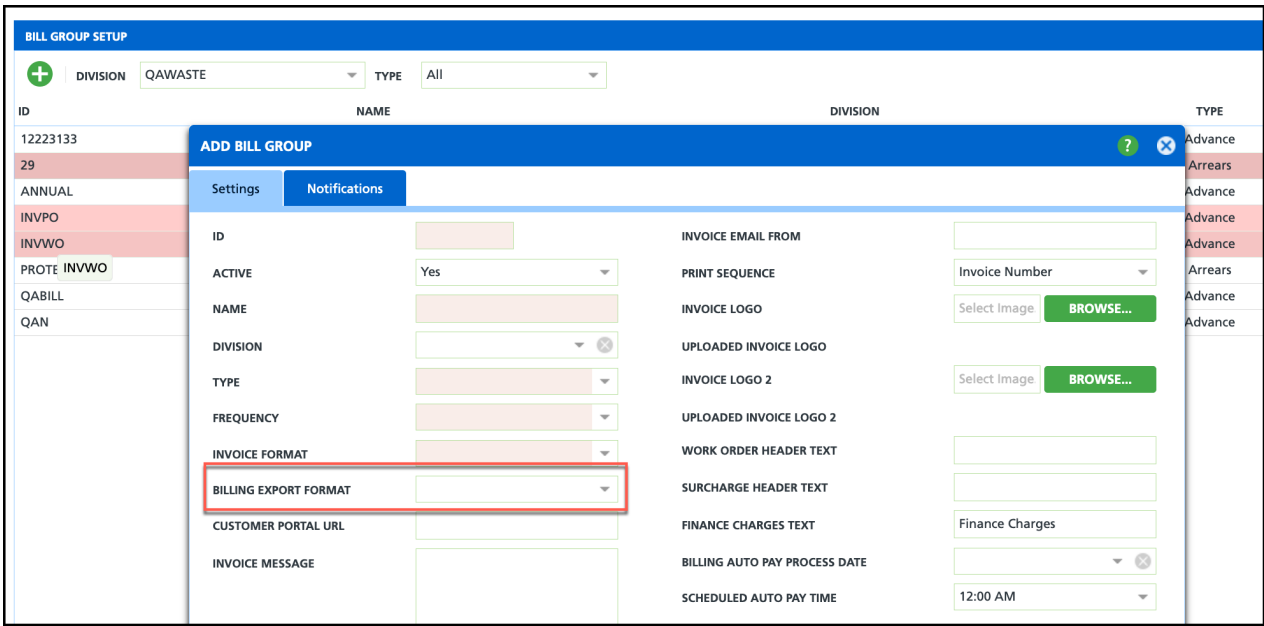

Export a Batch

Pathway: *Accounting > Billing*

In the 'Pending and In Process', or 'History' tabs on the Billing screen, use the available filtering options to display a specific set of completed batches. To export a batch, right-click within its row and select the 'Export' option. The batch will be exported in a separate tab according to the Billing Export Format assigned to the Bill Group.

*A batch must be in a **Processed or Posted** status to export. Otherwise, the Export option is not displayed.*
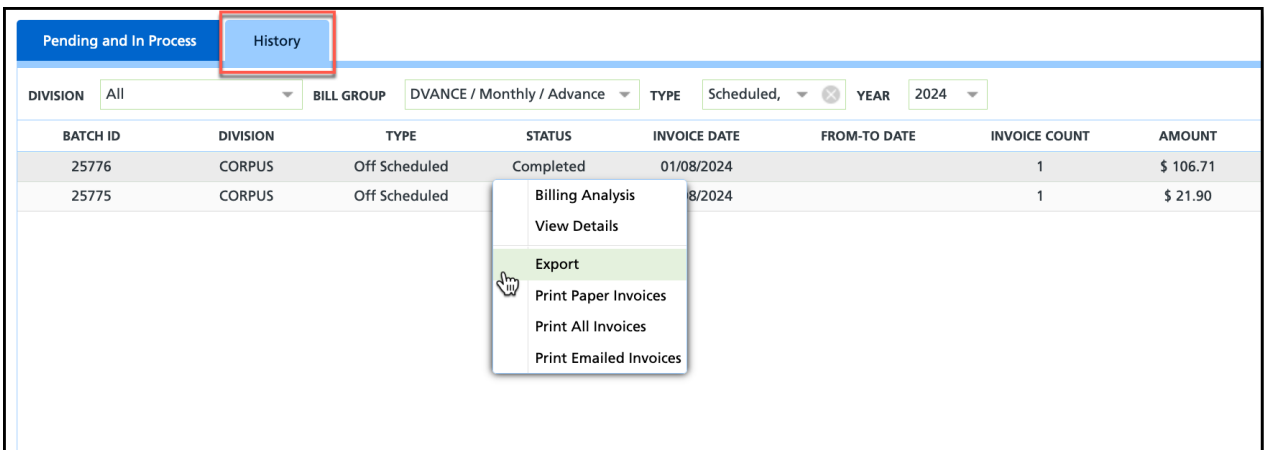
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Bill Group Setup