Export a Billing Batch

Last Modified on 12/04/2024 2:01 pm PST

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.

BILL GROUP SETUP					
DIVISION QAWA	STE 👻 TYPE	All			
ID	NAME		DIVISION		TYPE
12223133	ADD BILL GROUP			?	Advance
29 ANNUAL	Settings Notifications				Arrears Advance
INVPO					Advance
INVWO	ID		INVOICE EMAIL FROM		Advance
PROTE INVWO	ACTIVE	Yes 👻	PRINT SEQUENCE	Invoice Number 👻	Arrears
QABILL	NAME		INVOICE LOGO	Select Image. BROWSE	Advance
QAN	DIVISION	- × ⊗	UPLOADED INVOICE LOGO		Advance
			INVOICE LOGO 2	Select Image. BROWSE	
	ТҮРЕ	· · · · · · · · · · · · · · · · · · ·	INVOICE LOGO 2	Select Image. BROWSE	
	FREQUENCY	*	UPLOADED INVOICE LOGO 2		
	INVOICE FORMAT	.	WORK ORDER HEADER TEXT		
	BILLING EXPORT FORMAT	~	SURCHARGE HEADER TEXT		
	CUSTOMER PORTAL URL		FINANCE CHARGES TEXT	Finance Charges	
	INVOICE MESSAGE		BILLING AUTO PAY PROCESS DATE	- × (8)	
			SCHEDULED AUTO PAY TIME	12:00 AM -	

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.

Pending and In Process	History								
DIVISION All		L GROUP DVANCE / M	lonth	ly / Advance 📼	TYPE	Scheduled,	YEAR 2024	v	
BATCH ID	DIVISION	TYPE		STATUS	INVO	CE DATE	FROM-TO DATE	INVOICE COUNT	AMOUNT
25776	CORPUS	Off Scheduled	Co	ompleted	01/0	8/2024		1	\$ 106.71
25775	CORPUS	Off Scheduled		Billing Analysis		8/2024		1	\$ 21.90
				View Details					
				Export					
				Print Paper Invoi	ces				
				Print All Invoices					
				Print Emailed Inv	oices				
			_		_				

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Billing Screen Overview Create a Billing Batch Pre-Billing Workflow Process and Post a Billing Batch Bill Group Setup