


Anniversary 4 Week Billing (28 Day)

Last Modified on 07/17/2025 2:58 pm PDT

The 28-day anniversary billing system operates on a cycle that initiates billing every 28 days from the first billing date after the start of service. This document outlines the essential components of the 28-day billing setup, including the logic that drives the cycle, the configuration process, and key steps in the pre-billing review. These elements ensure a consistent and accurate approach to recurring billing.

| Pending and In Process | | History | | | | |
|-----------------------------------------------------------------------------------|----------|------------|---------------------|-------------|--------------|------------|
|  | DIVISION | QAWASTE | | | | |
| BILL GROUP | DIVISION | BATCH ID ↑ | TYPE | STATUS | INVOICE DATE | TO DATE |
| QA Billing Cycle | QAWASTE | 25918 | All Charges | Not Started | 12/01/2024 | 12/31/2024 |
| QA Billing Cycle 10 | QAWASTE | 25920 | All Charges | Not Started | 10/21/2024 | 11/01/2024 |
| QA Billing Cycle 5 | QAWASTE | 25916 | WO and Manual Ch... | Posted | 10/02/2024 | |
| QA Billing Notification | QAWASTE | 25909 | All Charges | Processed | 06/01/2024 | 06/30/2024 |
| QA_Doc_4 Week Anniversary | QAWASTE | 25939 | All Charges | Not Started | 11/12/2024 | |

Logic

- Anniversary billing begins with the first billing processed for an account after the service start date.
 - Example:** If service starts on 11/01 and billing is processed on 11/02, the account will be billed again 28 days from 11/02.

Setup Requirements

Permissions

Pathway: Setup > System > Permission

The following permissions are required to set up and process 28 Day Anniversary Billing:

| Permission ID | Permission Name | Purpose |
|---------------|--------------------|---------------------------------------------------------------------|
| 22 | Setup \ Accounting | Required for Bill Group setup. |
| 109 | View Billing | Required to view the Billing screen and create and process a batch. |
| 110 | Add Billing Batch | Required to create a billing batch. |
| 111 | Post Billing Batch | Required to post a billing batch. |

Bill Group

Pathway: Setup > Accounting > Bill Group

Configuration for 28 day billing is established at the bill group level by selecting 'Advance' from the **Type** field and the 'Anniversary 4 Week' option from the **Frequency** field. Additional setup selections should be made based on your company's billing procedures. Further documentation on the Bill Group screen and the setup

fields it includes can be reviewed here: [Bill Group Setup](#).

BILL GROUP SETUP

DIVISION

All

TYPE

Advance

| ID | NAME | DIVISION | TYPE | FREQUENCY |
|------------|------------------------|----------|---------|--------------------|
| 1 | COR-Q1-JAN-APR-JUL-OCT | CORPUS | Advance | Quarterly |
| 10 | | | | Monthly |
| 11 | | | | Quarterly |
| 12 | | | | Quarterly |
| 12223133 | | | | Monthly |
| 13 | | | | Monthly |
| 14 | | | | Monthly |
| 26 | | | | Quarterly |
| 27 | | | | Quarterly |
| 28 | | | | Quarterly |
| 3 | | | | Monthly |
| 30 | | | | Quarterly |
| ANNUAL | | | | Annually |
| ANNV_30D | | | | |
| ANNV_4WEEK | | | | Anniversary 4 week |
| ANV_4WK_C | | | | Anniversary 4 week |
| INVPO | | | | Monthly |
| INVVO | | | | Monthly |
| QABILL | | | | Monthly |
| QAN | | | | Monthly |

UPDATE BILL GROUP

Settings

Notifications

ID

ANNV_4WEEK

ACTIVE

Yes

NAME

HOU-Anniversary 4 week

DIVISION

HOUSTON

TYPE

Advance

FREQUENCY

Anniversary 4 week

INVOICE FORMAT

Navu Base Product Format A

BILLING EXPORT FORMAT

CUSTOMER PORTAL URL

MESSAGE DUE IN PAST 1-30 DAYS

MESSAGE DUE IN PAST 30-60 DAYS

MESSAGE DUE IN PAST 61-90 DAYS

MESSAGE DUE IN PAST 91 DAYS

CUSTOM 1

CUSTOM 2

INVOICE EMAIL FROM

PRINT SEQUENCE

Invoice Number

INVOICE LOGO

Select Image

BROWSE...

UPLOADED INVOICE LOGO

INVOICE LOGO 2

Select Image

BROWSE...

UPLOADED INVOICE LOGO 2

WORK ORDER HEADER TEXT

SURCHARGE HEADER TEXT

FINANCE CHARGES TEXT

Finance Charges

BILLING AUTO PAY PROCESS DATE

SCHEDULED AUTO PAY TIME

03 : 00 : 00 . 000 PM

Central Standard Time

PAPER BILL FEE CHARGE CODE

PAPER BILL FEE (PER INVOICE)

MINIMUM INVOICE AMOUNT TO BE NOTIFIED

0.00

MINIMUM ACCOUNT BALANCE TO BE NOTIFIED

0.00

ONE INVOICE PER

Disabled

DISABLE AUTOMATIC BILLING BATCH CREATION

No

DISABLE EMAIL INVOICE AS AN ATTACHMENT

No

Process Billing

Pathway: *Accounting > Billing*

Similar to other billing procedures, review the Pre-Billing Analysis screen to verify accuracy, confirm billing details, and ensure all account charges are correct before processing invoices. Additional information about the billing process can be reviewed here: [Pre-Billing Workflow](#).



To prevent the anniversary date from resetting, billing must be run daily, including holidays and weekends. To avoid any lapses, run anniversary billing for those days either in advance, or on the first day back.

Pending and In ProcessHistory

DIVISION

QAWASTE

| BILL GROUP | DIVISION | BATCH ID | TYPE | STATUS | INVOICE DATE | TO DATE | INVOICE COUNT |
|---------------------------|----------|----------|----------------------------|-------------|--------------|------------|---------------|
| QA Billing Cycle | QAWASTE | 25918 | All Charges | Not Started | 12/01/2024 | 12/31/2024 | |
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| QA Billing Notification | QAWASTE | 25909 | All Charges | Processed | 06/01/2024 | 06/30/2024 | 4 |
| QA_Doc_4 Week Anniversary | QAWASTE | 25939 | All Charges | Not Started | 11/12/2024 | | |

Edit Batch

Pre-Billing

Process Billing

Void

Omit Divisions from Billing Batch

PRE-BILLING ANALYSIS

Work Orders

Service Changes

Manual Charges

Pending Approval Adjustments

FILTER

WO Completed - Not Posted

COUNT

1

REVENUE

75.00

Search

| ROUTE | SITE | SCHEDULED | WO # | SERVICE TYPE | QTY | EQUIPMENT | REVENUE | COST | POSTING STATUS | PHOTOS |
|-------|-------------------------------------------------------------|--------------|---------|--------------|-----|-----------|----------|------|----------------|--------|
| | Carlou Coffee (49232001) 112 Chieftain St, Osceola | Tue 11/12/24 | 8735052 | TEST | 1 | 4 Yard FL | \$ 75.00 | | Pending | |

Customer Service Screen

Pathway: Customer Service

For accounts using Anniversary Billing, billing information will no longer appear in Account Details. Instead, the Next Bill Date will be displayed in red within Site Details.

49224

Anniversary Test Customer 1

1234 Main St
City, State, TX 54321

TERMS Net 15

INVOICE DELIVERY Printed

Active

DIVISION HOUSTON

ACCOUNT MGR Aliena Somers - Admin-NS (Sales)

CLASS COMMERCIAL

BILL GROUP HOU-Anniversary 4 week Advance

OLD ID 0000123456

SOURCE Call In

REBATE PAYMENT Not Applicable

PAPER BILL FEE - COMMERCIAL \$ 7.00

49224001

Anniversary Test Customer 1

1234 Main St
City, State, TX 54321

Active

DIVISION HOUSTON

SERVICE REGION HOUSTON OPEN MARKET

SALES REP Chris Fairchild (Sales)

SOURCE Call In

GENERATOR Not Applicable

SITE CLASS COM

SURCHARGE GRP Fuel Surcharge - Commercial

TAX REGION AUSTIN CITY-MTA-ETGW

TAX EXEMPT No

LEED REPORTABLE No

NEXT BILL DATE Dec 23, 2024

| CURRENT | 1-30 | 31-60 | 61-90 | 91-120 | 120+ | TOTAL |
|---------|------|-------|-------|--------|--------|--------|
| 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 139.50 | 139.50 |

Auto Pay Not Enabled

GHTS

PENDING

Account is significantly past due

ACTIVE SERVICES (1)

Standard

TOTAL RECURRING \$ 35.00

LEGEND

| QTY | SERVICE CODE | SERVICE ID | LAST ACTIVITY | FREQUENCY | SCHEDULE | PER UNIT RATE | RATE | WO MIN. | START DATE | END DATE | CONTRACT ... |
|-----|--------------------------|------------|---------------|-------------|----------|---------------|---------------------|---------|------------|----------|--------------|
| 1 | 4 Yard Truck Anniversary | 38550 | | 1 time each | T | \$ 35.00 | \$ 35.00 per 4 week | | 10/23/24 | | |

Related Articles

Create a Billing Batch

Pre-Billing Workflow

Process and Post a Billing Batch