

Anniversary 4 Week Billing (28 Day)

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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](#).

The screenshot displays the 'BILL GROUP SETUP' interface. At the top, there are filters for 'DIVISION' (All) and 'TYPE' (Advance). Below this is a table of bill groups. An 'UPDATE BILL GROUP' modal window is open, showing the configuration for a specific bill group. The modal has two tabs: 'Settings' and 'Notifications'. The 'Settings' tab is active, showing various configuration fields. The 'FREQUENCY' field is highlighted in yellow and set to 'Anniversary 4 week'. Other fields include 'ID', 'ACTIVE', 'NAME', 'DIVISION', 'TYPE', 'INVOICE FORMAT', 'BILLING EXPORT FORMAT', 'CUSTOMER PORTAL URL', and several message due date fields. The right side of the modal contains fields for 'INVOICE EMAIL FROM', 'PRINT SEQUENCE', 'INVOICE LOGO', and other invoice-related settings. The background table shows columns for 'ID', 'NAME', 'DIVISION', 'TYPE', and 'FREQUENCY'.

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 Process History

+ 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	
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 Charges Only	Posted	10/02/2024		1
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

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

Related Articles

[Create a Billing Batch](#)

[Pre-Billing Workflow](#)

[Process and Post a Billing Batch](#)