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.

BILL GROUP	DIVISION	BATCH ID 🕇	ТҮРЕ	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
_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.

DIVISION	All	TYPE Advance 👻			
	NAME		DIVISION	ТҮРЕ	FREQUENCY
	COR-Q1-	JAN-APR-JUL-OCT	CORPUS	Advance	Quarterly
	UPDATE BILL GROUP			? 🔇	Monthly
				• • •	Quarterly
	Settings Notifications				Quarterly
223133					Monthly
	ID	ANNV_4WEEK	INVOICE EMAIL FROM		Monthly
	ACTIVE	Yes 👻	PRINT SEQUENCE	Invoice Number 👻	Monthly
	NAME	HOU-Anniversary 4 week	INVOICE LOGO	Select Image. BROWSE	Quarterly
	NAME	-	INVOICE LOGO	BROWSE	Quarterly
	DIVISION	HOUSTON - 🛞	UPLOADED INVOICE LOGO		Quarterly
	ТҮРЕ	Advance -	INVOICE LOGO 2	Select Image. BROWSE	Monthly
		Anniversary 4 week			Quarterly
INUAL	FREQUENCY	Anniversary 4 week	UPLOADED INVOICE LOGO 2		Annually
NV_30D	INVOICE FORMAT	Navu Base Product Format A 📼	WORK ORDER HEADER TEXT		
NNV_4WEEK	BILLING EXPORT FORMAT	~	SURCHARGE HEADER TEXT		Anniversary 4 v
NV_4WK_C				a l a l	Anniversary 4 v
VPO	CUSTOMER PORTAL URL		FINANCE CHARGES TEXT	Finance Charges	Monthly
vwo	MESSAGE DUE IN PAST 1-30 DAYS		BILLING AUTO PAY PROCESS DATE	- ©	Monthly
ABILL	MESSAGE DUE IN PAST 30-60 DAYS		SCHEDULED AUTO PAY TIME	03:00:00.000 PM	Monthly
N	MESSAGE DUE IN PAST 50-60 DATS			Central Standard Time	Monthly
	MESSAGE DUE IN PAST 61-90 DAYS				
	MESSAGE DUE IN PAST 91 DAYS		PAPER BILL FEE CHARGE CODE	- · · · · · · · · · · · · · · · · · · ·	
			PAPER BILL FEE (PER INVOICE)		
	CUSTOM 1		MINIMUM INVOICE AMOUNT TO BE NOTIFIED	0.00	
	CUSTOM 2		WINNING INVOICE AMOUNT TO BE NOTIFIED		
			MINIMUM ACCOUNT BALANCE TO BE NOTIFIED	0.00	
			ONE INVOICE PER	Disabled 👻	
	1		DISABLE AUTOMATIC BILLING BATCH CREATION	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.

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 11/1/2/204 06/30/2024 4 Pre-Billing Process Billing Void Not Started 11/1/2/204 1 1 Void Omit Divisions from Billing Batch FILTER Work Orders Service Changes Manual Charges Pending Approval Adjustments Image: Started Star	QA Billing Cycle QAWASTE 25918 All Charges Not Started 1201/2024 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 Loc 4 Week Anniversary QAWASTE 25939 All Charges Not Started 11/12/2024 4 Void Pre-Billing Pre-Billing Pre-Billing Void 1/12/2024 4 4 Void Onit Divisions from Billing Bath FRE-BILLING ANALYSIS Void 1/12/2024 5 Void 1/12/2024 5 Mork Orders Service Changes Manual Charges Pending Approval Adjustments Cost Posting Cost Posting Cost Posting Cost Posting Portors Startus Piotors Startus Piotors Startus Piotors Startus Piotors Startus Pio											_
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 11/1/12/204 4 Void Onit Divisions from Billing Batch Pre-BilLING ANALYSIS Void Void Futter Work Orders Service Changes Manual Charges Pending Approval Adjustments Futter Futter Void Futter Void Service Changes Manual Charges Pending Approval Adjustments Futter Void Service Changes Manual Charges Pending Approval Adjustments Void Service Changes Tup Process 2000 Service Changes Tup Process 2000 Service Changes	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 Cycle 5 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 4 Pre-Billing Process Billing Void UNIX Orders Service Changes Manual Charges Pending Approval Adjustments Pre-Billing Pre-Bi			DIVISION	BATCH ID 🕇			STATUS	INVOICE DATE	TO DATE	INVOICE COU	NT
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 4 Pre-Billing Pre-Billing Precessed 06/01/2024 06/30/2024 4 Void Omit Divisions from Billing Batch Precessed 0anual Charges Pending Approval Adjustments Omit Divisions from Billing Batch FILTER WO Completed - Not Posted Count 1 REVENUE 75.00 Search Route Strite ScheDuleD Wo # SERVICE TYPE QT EQUIPMENT REVENUE COST POSTING STATUS PHOTOS Caribou Coffee (4922/2001) Tue 11/12/24 875:00 Pending PHOTOS	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 4 Pre-Billing Process Billing Void Not Started 11/12/2024 4 Omit Divisions from Billing Batch PRE-BILLING ANALYSIS ************************************	-					5					_
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 Pre-Billing Pre-Billing <	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 4 Process Billing Process Billing Void Image: Service Charges Manual Charges Pending Approval Adjustments ? Void Omit Divisions from Billing Batch FILTER WO Completed - Not Posted count 1 REVENUE 75.00 Image: Status PHOTOS ROUTE \$ STTE ScheDULED \$ WO # SERVICE TYPE QT Equipment REVENue Cost PStatus PHOTOS Caribou Coffee Tue 11/12/24 8735052 TEST 1 4 Yard FL \$75.00 Pending						-			11/01/2024		_
QA_Doc_4Week Anniversary QAWASTE 25939 All Charges Not Started 11/12/2024 Edit Batch Pre-Billing Pre-Billing PRE-BILLING ANALYSIS Image: Count of the count	QA_Doc 4 Week Anniversary QAWASTE 25939 All Charges Not Started 11/12/2024 Edit Batch Pre-Billing Process Billing Void Pre-Billing Analysis ? Void Omit Divisions from Billing Batch FRE-BILLING ANALYSIS ? ? FLITER WO Completed - Not Posted Countr 1 REVENUE 75.00 Image: Cost Posting Process Startus Process Proc	-					, s					
Edit Batch Pre-Billing Process Billing Void Omit Divisions from Billing Batch FILTER WOrk Orders Strite ScheDuleD Work Search ROUTE SITE ScheDuleD Wo # Search Strite Caribou Coffee Tue 11/12/24 (49232001) Tue 11/12/24 Manual Charges Pending Approval Adjustments Caribou Coffee Tue 11/12/24 (49232001) Tue 11/12/24 Y 50.00 Pending	Edit Bach Pre-Billing Process Billing Void Omit Divisions from Billing Bach PRE-BILLING ANALYSIS Image: Completed - Not Posted Count 1 REVEnue 7 Count 1 REVEnue 1 4 Yard FL									06/30/2024	4	
Pre-Billing Void PRE-BILLING ANALYSIS Omit Divisions from Billing Batch Work Orders Service Changes Manual Charges Pending Approval Adjustments ROUTE 1 SITE SCHEDULED 1 W0 # SERVICE TYPE QTY EQUIPMENT REVENUE COST POSTING STATUS Caribou Coffee (49232001) 102322001) Tue 11/12/24 8735052 TEST 1 4 Yard FL \$ 75.00 Pending	Pre-Billing Void Omit Divisions from Billing Batch PRE-BILLING ANALYSIS 2 Image: Colspan="5">Process Billing Void Omit Divisions from Billing Batch Image: Colspan="5">FILTER WO Completed - Not Posted Pending Approval Adjustments Route 1 stree Scruice Changes Manual Charges Pending Approval Adjustments Colspan="5">Colspan="5"Colspa="5"Colspa="5"Colspa="5"Colspan="5"Colspan="5"Colspan="5"Colspan="	QA_Doc_4 Week	Anniversary	QAWASTE	25939	All C	harges	Not Started	11/12/2024			
Process Billing Void PRE-BILLING ANALYSIS Omit Divisions from Billing Batch Work Orders Service Changes Manual Charges Pending Approval Adjustments Image: Completed - Not Posted count 1 Revenue 75.00 Search ROUTE † SITE SCHEDULED † W0 # SERVICE TYPE QTY EQUIPMENT REVENUE COST POSTING STATUS (J3222001) (J3222001) Caribou Coffee (J3223001) Tue 11/12/24 8735052 TEST 1 4 Yard FL \$ 75.00 Pending	Process Billing Void Omit Divisions from Billing Batch PRE-BILLING ANALYSIS ? Mork Orders Service Changes Manual Charges Pending Approval Adjustments FILTER WO Completed - Not Posted count 1 REVENUE 75.00 Image: Cost Posting Photos ROUTE ⁺ SITE Schedbulled ⁺ WO # SERVICE TYPE QTY EQUIPMENT REVENUE Cost Posting STATUS Caribou Coffee (43223001) Tue 11/12/24 8735052 TEST 1 4 Yard FL \$75.00 Pending		Edit Batch									
Work Orders Service Changes Manual Charges Pending Approval Adjustments Omit Divisions from Billing Batch FILTER WOC Completed - Not Posted Count REVENUE 75.00 Search ROUTE I STITE SCHEDULED I WO # SERVICE TYPE QTY EQUIPMENT REVENUE Cost Posting Caribou Coffee Tue 11/12/24 8735052 TEST 1 4 Yard FL \$75.00 Pending	Void Omit Divisions from Billing Batch FILTER WO Completed - Not Posted v count 1 REVENUE 75.00 ROUTE † SITE SCHEDULED † WO # SERVICE TYPE QTY EQUIPMENT REVENUE COST POSTING Caribou Coffee (49232001) Caribou Coffee (49232001) Tue 11/12/24 8735052 TEST 1 4 Yard FL \$ 75.00 Pending	-	Pre-Billing									-
Omit Divisions from Billing Batch Work Orders Service Changes Wanual Charges Pending Approval Adjustments FILTER WOR Conjeted - Not Posted	Omit Divisions from Billing Bath Work Orders Service Changes Wantual Charges Pending Approval Augusthems FILTER WO Completed - Not Posted count nevenue 75.00 Search Cost Cost Cost Struce Charges Tue 11/12/24 8735052 TEST A Yard FL \$75.00 Pending		Process Billing	PRE-BIL	LING ANALYSIS							<u>(</u>
FILTER WO Completed - Not Posted COUNT 1 REVENUE 75.00 Search ROUTE SITE SCHEDULED WO # SERVICE TYPE QTY EQUIPMENT REVENUE COST POSTING PHOTOS Caribou Coffee (49232001) Tue 11/12/24 8735052 TEST 1 4 Yard FL \$75.00 Pending	FILTER WO Completed - Not Posted COUNT REVENUE 75.00 Search COUNT ROUTE * SITE SCHEDULED * W0 # SERVICE TYPE QTY EQUIPMENT REVENUE COST POSTING PHOTOS Caribou Coffee (49232001) Tue 11/12/24 8735052 TEST 1 4 Yard FL \$75.00 Pending		Void	Work	Orders Service C	hanges Ma	anual Charges	Pending Appr	oval Adjustments			
ROUTE † SITE SCHEDULED † WO # SERVICE TYPE QTY EQUIPMENT REVENUE COST POSTING STATUS Caribou Coffee (49232001) Tue 11/12/24 8735052 TEST 1 4 Yard FL \$ 75.00 Pending	Caribou Coffee (49232001) Tue 11/12/24 8735052 TEST 1 4 Yard FL \$ 75.00 Pending		Omit Divisions from Billing Batch		_							
Caribou Coffee (4932001) Tue 11/12/24 8735052 TEST 1 4 Yard FL \$ 75.00 Pending	Caribou Coffee (49232001) Tue 11/12/24 8735052 TEST 1 4 Yard FL \$ 75.00 Pending 1 11/12/24 11/12/24 1 1 4 Yard FL \$ 75.00 Pending			FILTER	WO Completed - Not F	osted 👻	COUNT 1	REVENUE 7	5.00	Sear Sear	rch	q
(49232001) 112 Chiefrain St,	(49322001) 112 Chieftain St,			ROUTE 🕇	SITE	SCHEDULED 🕇	WO # SERVIC	E TYPE QTY	EQUIPMENT	REVENUE		PHOTOS
Osceola					(49232001) 112 Chieftain St,	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 C	ustomer 1						49224001	Anniversary Test Customer	r1			Ð
	Ctty, State, IX 54321 Division HOUSTON TERMS Net 15 ACCOUNT MGR Aliena Somers - Admin-NS (Sales) INVOICE DELIVERY Printed BILL GROUP HOU-Anniversary 4 week Advance OLD ID 0000123456 SOURCE Call In									Active DIVISION SERVICE SALES RE SOURCE GENERAT SITE CLA. SURCHAI TAX REGI TAX EXEI LEED REP	REGION HOUS P Chris F Call In TOR Not A SS COM RGE GRP <u>Fuel S</u> ION AUSTI	TON TON OPEN MARK airchild (Sales)	nercial
	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	2					
						Auto Pa	y Not Enabled						
GHTS				PE	DING								
ccount is si	gnificantly past due												
ACTIVE SERVI	CES (1) Standard			- 2	+ •	TOTAL	RECURRING \$3	5.00					LEGEND
QTY SER	VICE CODE		SERVICE II	LAST ACTIV	/ITY FI	REQUENCY SC	HEDULE PE	R UNIT RATE	RATE	T WO MIN. STAR	T DATE END DATE	CONTRACT	
							-						

Related Articles

Create a Billing Batch Pre-Billing Workflow Process and Post a Billing Batch