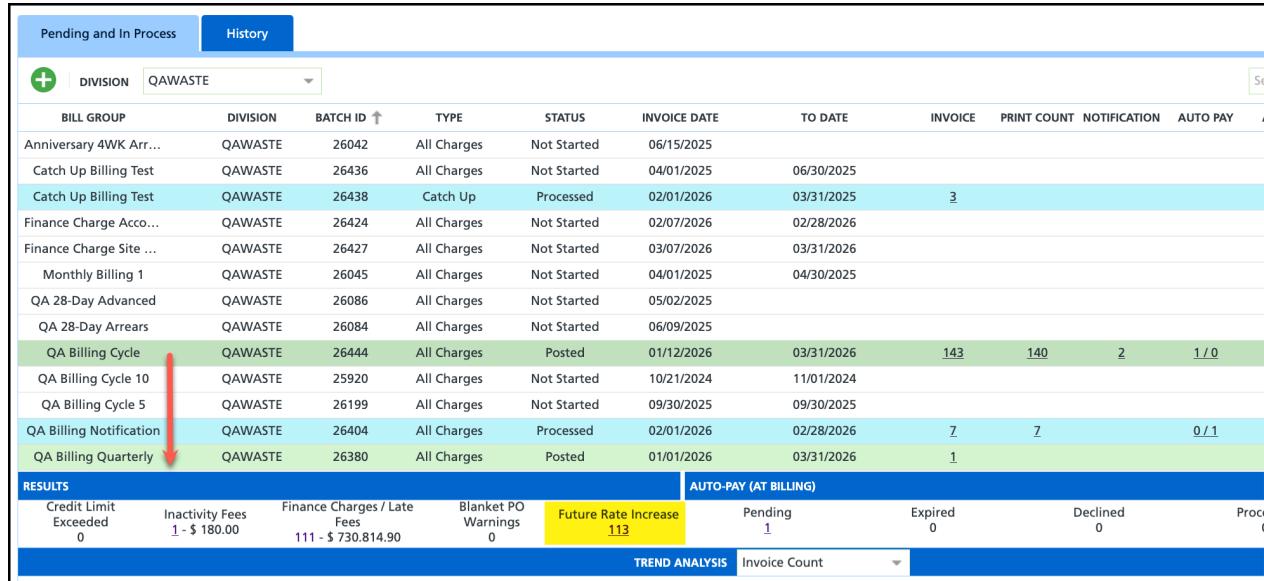


Notify of Future Rate Increase During Billing

Last Modified on 01/14/2026 12:13 pm PST

Pathway: Accounting > Billing

Notifying customers of upcoming rate changes is an important part of transparent billing. This functionality helps users proactively inform customers by flagging invoices affected by a future rate increase and displaying a customizable message directly on those invoices.



The screenshot shows the 'History' tab of the Billing module. At the top, there are tabs for 'Pending and In Process' and 'History'. Below that is a search bar with a 'DIVISION' dropdown set to 'QAWASTE'. The main area displays a table of billing batches with columns: BILL GROUP, DIVISION, BATCH ID, TYPE, STATUS, INVOICE DATE, TO DATE, INVOICE, PRINT COUNT, NOTIFICATION, and AUTO PAY. A red arrow points to the 'QA Billing Quarterly' row. The results summary table at the bottom has columns: Credit Limit Exceeded, Inactivity Fees, Finance Charges / Late Fees, Blanket PO Warnings, Future Rate Increase, Pending, Expired, Declined, and Processed. The 'Future Rate Increase' column is highlighted in yellow and shows a value of 113.

RESULTS									
Credit Limit Exceeded 0	Inactivity Fees 1 - \$ 180.00	Finance Charges / Late Fees 111 - \$ 730,814.90	Blanket PO Warnings 0	Future Rate Increase 113	Pending 1	Expired 0	Declined 0	Proc 0	

Permissions

The following permission is required to include a notification on invoices for accounts that are part of a future rate increase.

Permission ID	Permission Name
109	View Billing and Process a Billing Batch

Requirements

The following requirements must be met to add a notification to an invoice. **Please note** that not all invoice formats support rate increase notifications, including certain custom formats. If this functionality is needed, please submit a request.

- The Future Rate Increase hyperlink displays a count of invoices affected by a recurring rate increase where the effective date is greater than the billing invoice date.
- The new rate is greater than the previous rate.
- The billing batch status is open, in progress or posted.

Add a Notification

The process to add a notification is simple and will be printed on invoices until the billing date is greater than the rate increase date.

The screenshot shows the Billing screen with a list of bill groups on the left and a detailed view of a selected bill group on the right. A red arrow labeled '1' points to the 'QA Billing Cycle' row in the list. A red circle labeled '2' highlights the 'Future Rate Increase' link in the 'RESULTS' section. A red circle labeled '3' highlights the 'MESSAGE' box in the pop-up window, which contains the text: 'Important Notice - Service rates will be increasing by 3% effective April 1st, 2026.' The pop-up window has 'SAVE' and 'CANCEL' buttons at the bottom.

FUTURE RATE INCREASE INVOICES					
INVOICE #	ACCOUNT ID	ACCOUNT NAME	SITE ID	SITE NAME	AMOUNT
948624	49208	Subway			\$ 441.38
948625	49209	Pizza Hut			\$ 441.38
948626	49211	Starbucks			\$ 441.38
948627	49212	Starbucks			\$ 441.38
948628	49213	Caribou			\$ 441.38
948629	49240	Watershed			\$ 529.77
948630	49242	Loggers			\$ 1,437.57
948631	49243	Yang's Kitchen			\$ 264.87
948633	49246	Kyoto Gyukatsu			\$ 635.77
948720	49248	Major Dumplings	49248001	Major Dumplings	\$ 556.50
948724	49249	PC			\$ 441.38

RESULTS

AUTO-PAY (AT BILLING)							
Credit Limit Exceeded 0	Inactivity Fees 1 - \$ 180.00	Finance Charges / Late Fees 111 - \$ 730.814.90	Blanket PO Warnings 0	Future Rate Increase 113	Pending 1	Expired 0	Declined 0

TREND ANALYSIS

- From the **Billing** screen, select the bill group row that includes a rate increase.
- In the **Results** section, click the **Future Rate Increase** hyperlink. The **Future Rate Increase Invoices** pop-up window will display.
- Enter the notification text you want displayed on the invoice in the **Message** box, then click **Save**.

Invoice Example

The following is an example of how the notification may appear on an invoice. The placement of the notification may vary depending on the invoice format used.

NavuSoft, Inc
123 Navu Way
St. Paul, MN 55897



INVOICE #	948715
ACCOUNT #	49571
AMOUNT	\$ 877.19
DATE	Jan 12, 2026
DUE DATE	Feb 1, 2026

Pay Online
navuqa-customerportal.navusoft.net login or
use QUICK PAY CODE 71D32

Scandia Heating and Air Conditioning

1234 State Street
Scandia, MN 55073

Pay By Check PO Box 123
St. Paul, MN 55897

Enclosed Check # _____
Amount _____

For proper credit return this portion

Site 49571001 - Scandia Heating and Air Conditioning - 1234 State Street, Scandia, MN 55073

DATE	DESCRIPTION	Work Order #	PO #	QTY	RATE	TOTAL
11/03/25 - 11/30/25	10 Yard Trash Service			1	\$ 150.00 per month	140.00
12/01/25 - 12/31/25	10 Yard Trash Service			1	\$ 150.00 per month	150.00
01/01/26 - 01/31/26	10 Yard Trash Service			1	\$ 150.00 per month	150.00
02/01/26 - 02/28/26	10 Yard Trash Service			1	\$ 150.00 per month	150.00
03/01/26 - 03/31/26	10 Yard Trash Service			1	\$ 150.00 per month	150.00
	Fuel Surcharge-Commercial					37.00
	Fuel Surcharge-Residential					0.00
	Pearland Franchise Fee					37.00
					Tax	\$ 63.19
					Site Total	\$ 877.19
					INVOICE TOTAL	\$ 877.19

Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Total Due
877.19	0.00	0.00	0.00	0.00	877.19

Total balance due includes current charges, however it may not reflect recent payments in transit.

Thank You for your business!

Important Notice - Service rates will be increasing by 3% effective April 1st, 2026.

Notification messages are not highlighted on invoices. Highlighted here for reference purposes only.

Related Articles

Rate Update Batch