

Bill Group (Setup / Accounting) - New Catch Up Billing Feature (20140, 20031) [New Feature]

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Billing has been enhanced to support a new **Catch Up** billing batch type that includes previously unbilled services and charges, including recurring services and any catch up billing charges enabled at the bill group level. Catch Up billing may be used in scenarios such as new services being added or increased between billing periods, allowing the account to be caught up and helping prevent customers from having a larger balance on their next invoice.

Bill Group Setup Changes

To support this, a new **Catch Up Billing** tab has been added to the Bill Group Setup screen with configuration options to control the inclusion of **Manual Charges** and **Work Order Charges** when running a catch up billing batch.

The screenshot displays the 'BILL GROUP SETUP' interface. At the top, there are filters for 'DIVISION' (set to 'All') and 'TYPE' (set to 'All'). Below these is a table with columns 'ID', 'NAME', and 'DIVISION'. Row 11 is highlighted in red. Overlaid on this is a modal window titled 'ADD BILL GROUP'. The modal has five tabs: 'Settings', 'Notifications', 'Messages and Text', 'Minimum Amount Rules', and 'Catch Up Billing'. The 'Catch Up Billing' tab is selected and highlighted with a red rectangular box. Inside this tab, there are two checkboxes: 'INCLUDE MANUAL CHARGES' and 'INCLUDE WORK ORDER CHARGES', both of which are currently unchecked. At the bottom of the modal is a green 'SAVE' button. The modal also features a green question mark icon and a blue close icon in the top right corner.

Billing Batch Changes

In the Create Billing Batch window, a new **Catch Up** option has been added to the **Type** drop-down. When selected, a **Bill Group**, **Invoice Date**, and **Bill To Date** are required. Based on the Catch Up Billing settings enabled for the selected bill group, those selections will be included along with informational messaging displayed alongside the date fields to indicate what will be billed for the specified time period.

Pending and In Process

History

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DIVISION

QAWASTE

BILL GROUP	DIVISION	BATCH ID	TYPE
Anniversary 4WK Arrears	QAWASTE	26042	All Charges

CREATE BILLING BATCH

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TYPE

Catch Up

BILL GROUP

QA Billing Cycle / Monthly / Advance / QAWASTE

INVOICE DATE

01/31/2026

Work Orders and Manual Charges will be billed through 1/31/26.

BILL TO DATE

04/30/2026

Recurring Services will be billed through 4/30/26.

Catch up billing will calculate Recurring Services, Manual Charges, Work Order Charges.

CREATE BATCH