


Default Bill Group Setup

Last Modified on 04/21/2026 8:22 am PDT

Pathway: Setup > Account > Default Bill Group

Default Bill Group Setup provides a way to assign an existing **Bill Group** as the default bill group for a given **Division** and **Account Class**.



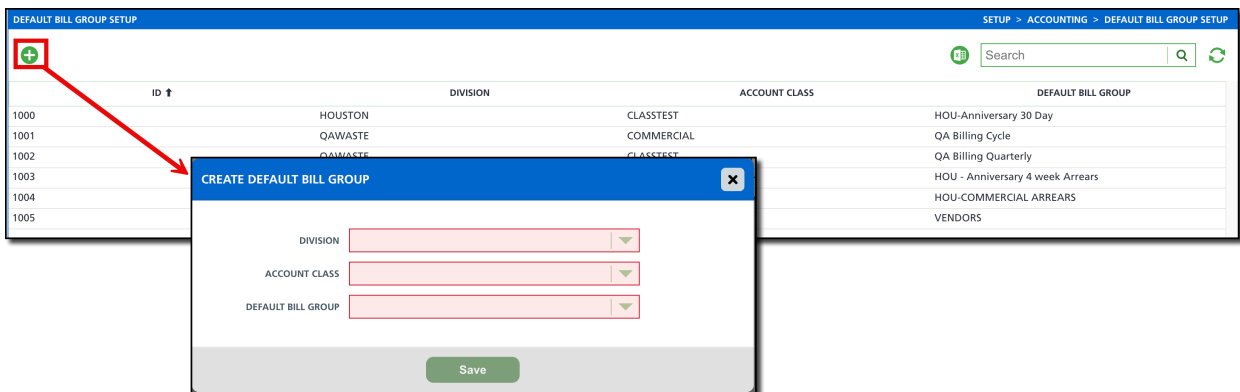
ID ↑	DIVISION	ACCOUNT CLASS	DEFAULT BILL GROUP
1000	HOUSTON	CLASSTEST	HOU-Anniversary 30 Day
1001	QAWASTE	COMMERCIAL	QA Billing Cycle
1002	QAWASTE	CLASSTEST	QA Billing Quarterly
1003	HOUSTON	BROKER	HOU - Anniversary 4 week Arrears
1004	HOUSTON	Cash Customer	HOU-COMMERCIAL ARREARS
1005	Doc Division	COMMERCIAL	VENDORS

Field Descriptions

Field	Description
ID	System provided unique identifier for a Default Bill Group.
Division	Predefined Division of an account used to separate business units, geographical regions, or different companies operating under the same account.
Account Class	Predefined Account Class of an account used to categorize accounts and define default settings.
Default Bill Group	Predefined Bill Group to be assigned to the Account if the Division and the Account Class are selected when creating a new account.

Add a Default Bill Group

To add a Default Bill Group, use the following steps. Once created and active, it will be available for selection in drop-downs and filters within the system.



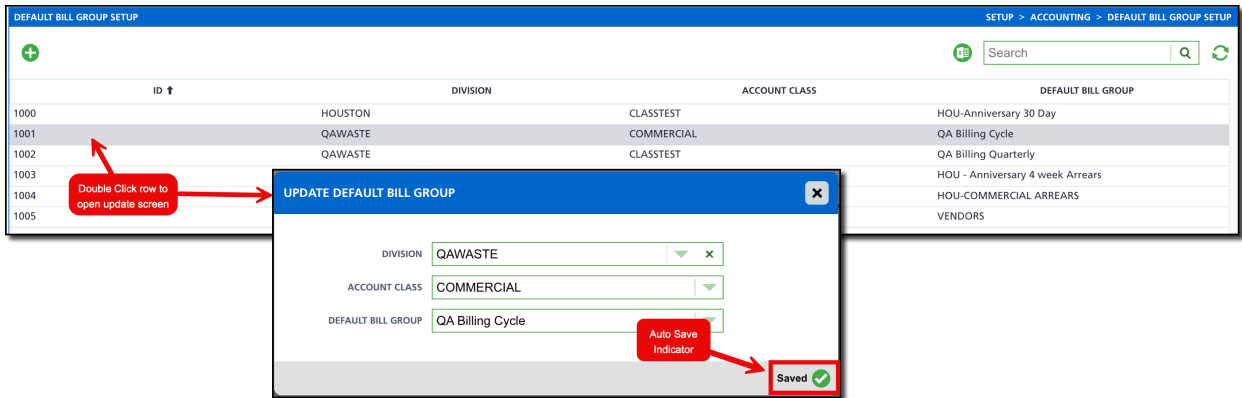
1. Click the **green +** icon to display the *Create Default Bill Group* editor.
2. Select a **Division** from the drop-down.
3. Select an **Account Class** from the drop-down. Only those account classes associated with the selected

Division will populate in this list

4. Select a **Bill Group** from the drop-down. This will set that bill group as the default bill group for that Division/Account combo.
5. Click **Save** when finished.

Edit a Default Bill Group

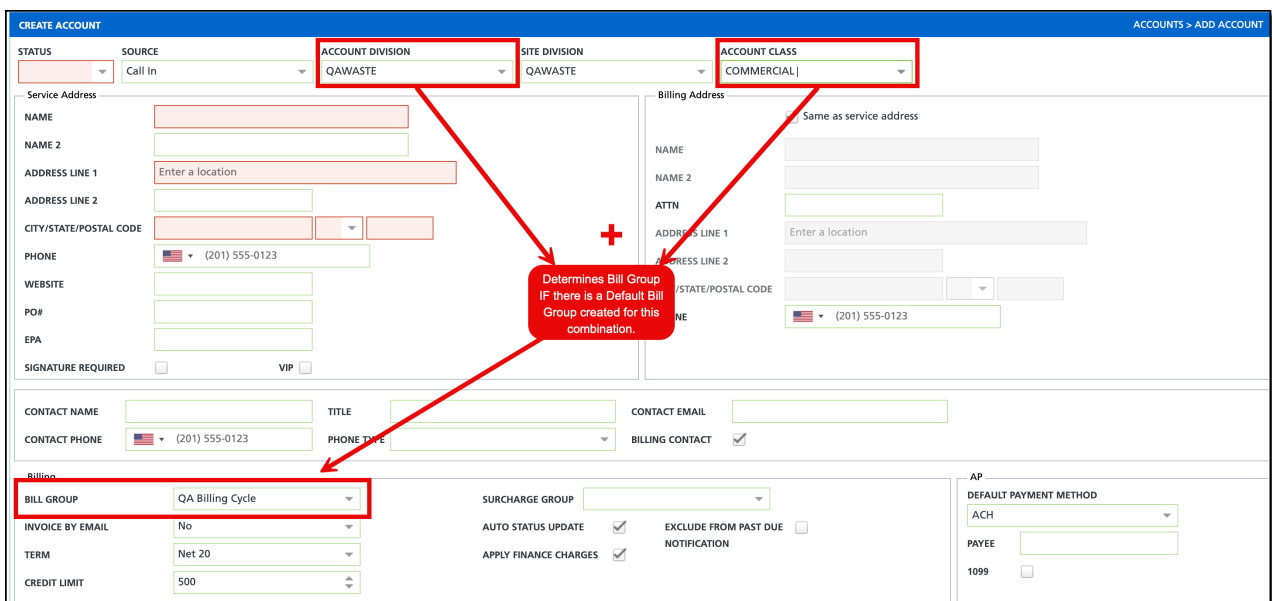
To edit an existing Default Bill Group use the following steps.



1. Double-click the row of the **Default Bill Group** to modify. This opens the *Update Default Bill Group* screen.
2. Use the drop-downs, to change the **Division**, **Account Class**, and/or the **Default Billing Group**.
3. Click outside a field to **auto save** changes.

Application of Default Bill Groups

After a default bill group has been set up, it can be used when creating a new account or updating the Division and Class of an existing account. If the Division/Class has a default bill group assigned to it, then the Bill Group field will auto-populate.



Permissions

The following permission is required to view, add and edit the Attachment Type Setup screen:

Permission ID	Permission Name
23	Setup \ Account

Related Articles

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