



marketing > data > print > distribution
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BS&A Cloud Utility Bill Export Notes

The below notes and graphics have been compiled from a township utility billing professional to guide you in the process of exporting utility bill files. While your BS&A software version or type may be different, the general process is provided to help you save money and time by enlisting SBF Enterprises to provide address reports, print and mail your tax bills.

1) Click on: Cycle Manager and then choose the cycle you are going to bill.

Make sure your billing dates on the right are correct. At the very least, you will need to

Calculate Bills before you **Export Bills to Printing Company**

INFORMATIONCOMMENTS 0ATTACHMENTS 0

CYCLE MANAGER

Cycle G

Cycle TypeG

DescriptionSEPTEMBER 2026 - G (CHECK "BILL ITEM DISCOUNT" ~ 1/3 OFF SEWER)

ADD NEW RECORD

TASK	SCHEDULED	COMPLETED	COMPLETED BY			
Import Meter Reads (Legacy)		08/18/2026	JG	▶ RUN	DETAILS...	⊗
Print Abnormal Usage		08/19/2026	JG	▶ RUN	DETAILS...	⊗
2 QRT 0 USE REVIEW				▶ RUN	DETAILS...	⊗
Calculate Bills		08/28/2026	JG	▶ RUN	DETAILS...	⊗
TOP 100 WATER USERS		08/28/2026	JG	▶ RUN	DETAILS...	⊗
Print Billing Register				▶ RUN	DETAILS...	⊗
Export Bills to Printing Company		08/28/2026	JG	▶ RUN	DETAILS...	⊗
Email Bills				▶ RUN	DETAILS...	⊗
Journalize Bills				▶ RUN	DETAILS...	⊗
Export ACH File				▶ RUN	DETAILS...	⊗
Calculate Penalty				▶ RUN	DETAILS...	⊗
Print Penalty Register				▶ RUN	DETAILS...	⊗
Redistribute Credits				▶ RUN	DETAILS...	⊗
RUN PAST DUE				▶ RUN	DETAILS...	⊗

1 - 14 of 14 items

Completed Date

▼ BILLING INFORMATION

Billing Date09/01/2026

Billing from Date06/01/2026

Billing to Date08/31/2026

Billing Days92

Due Date09/21/2026

Past Due Date09/22/2026

☐ Is Final Cycle

SAVE

DISCARD

ACTIVITY

ALL 15 | AUDIT 15 | MESSAGES 0

2) Click on: Run to the right of **Export Bills to Printing Company** and a screen similar to the image on the following page will appear.



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3) Under the **Process Options** tab, make sure you have the proper options selected here.
Click On: Save Generated Files if you would like to save the file directly to a folder.
Then, make sure you and choose the folder location in which you want the saved files placed.

The screenshot shows the 'Utility Bill Export' dialog box, specifically the 'STEP 2: ENTER OPTIONS' section. The 'PROCESS OPTIONS' tab is active. Under 'DATA OPTIONS', the 'Custom Export' dropdown is set to 'Generic Bill V1'. The 'Additional File Store' dropdown is empty. The 'Custom File Name' field contains 'Utility Bills for SBF'. The 'Save Generated Files' checkbox is checked. The 'Folder Location' field displays the path 'G:\WATER\WATER FOLDER\BILLING\G - LCT\2026\09 SEP'. A red arrow points from the text 'Click On: Save Generated Files' to the checked checkbox. A red oval highlights the 'Custom File Name' and 'Folder Location' fields. The background shows a list of dates (2026) and a 'COST ESTIMATE' label at the bottom left. At the bottom right of the dialog are 'RUN PROCESS' and 'CANCEL' buttons.



3) Click On: Filtering Options Since we don't want to send electronic bills to the printer, check the **Use Data Filtering Options** box. Under Bill Export Features, make sure you check the box for **Do Not Export Bills for Paperless Residents**.

The screenshot shows the 'Utility Bill Export' form with the following sections and options:

- STEP 1: SELECT POPULATION**
 - Population: Workspace
 - Workspace: All Accounts
 - Additional Filters (AND): None Specified
- STEP 2: ENTER OPTIONS**
 - PROCESS OPTIONS**
 - ☒ Use Data Filtering Options
 - FILTERING OPTIONS**
 - BILL EXPORT FILTERS**
 - ☐ Use Minimum Account Balance Filter
 - ☐ Use Account Balance Range
 - ☒ Do Not Export Accounts With Zero Balance
 - ☒ Do Not Export Bills for Paperless Residents
 - ☐ Do Not Export Accounts in Print Group
 - ☐ Export Prior Bill for Each Account
 - ☐ Enable Resident Filter
 - ACCOUNT FILTERS**
 - ☒ Filter by Cycle Type
 - ☐ Filter by Section / Zone
 - ☐ Filter by Account Class
 - ☐ Filter by Route / Book
 - ☐ Filter by Print and Payment Group
 - ☐ Include Inactive Accounts
 - ☐ Include Final Bills
 - ☐ Include No Bill This Cycle Accounts

At the bottom of the form, there are buttons for 'RUN PROCESS' and 'CANCEL'.

4) Under Account Filters make sure you check the appropriate boxes for your billing and corresponding cycle, sections/zone, routes/books, etc.

5) Click On: Run Process



5) A file will save to the folder you chose, or you can save one (along with the Billing Summary) when your report finishes and the report box comes up.

6) Go to the saved file, right click on it and **Compress to Zip** to get the file you send to SBF Enterprises.

Thanks to help from the professional at City of St. Joseph for these instructions. SBF Enterprises and the City of St. Joseph have had a successful relationship with utility bill (sheeted and postcard) print/mail and other print project for nearly 30 years.

IMPORTANT: Our only goal is to provide up-to-date and comprehensive information about BS&A export, print, mail solutions. If you see an error or wish to add content that will help the BS&A community at large, please email your notes or concerns to dansherman@sbf-phcs.com. We will have a consortium of users review them and update our notes as they suggest.