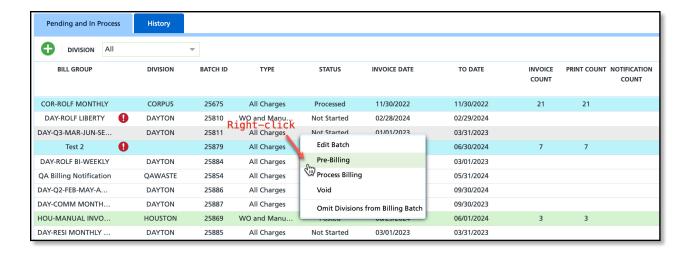# Pre-Billing Workflow

Last Modified on 07/16/2024 4:10 pm EDT

Pathway: *Accounting > Billing*

This article details the Pre-billing work flow that should be followed to prevent billing errors and revenue loss. This process is completed in the Billing tool for billing batches marked 'Not Started'.
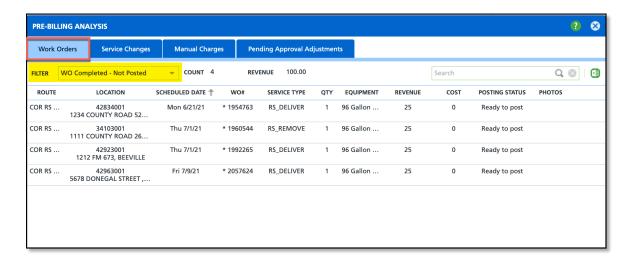

> 🔔 Review each of the tabs in the Pre-Billing Analysis screen before processing billing.
> Work Orders | Service Changes | Manual Charges | Pending Approval Adjustments

Review: Work Orders

Use the drop down Filter field in the Work Orders tab to review work orders for possible billing discrepancies. Reviewing work orders will help prevent revenue loss
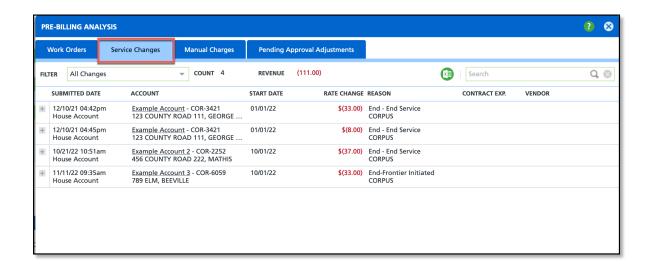

Filter Options

Filter	Description

WO Completed - Not Posted *Review Important	Displays a list of Work Orders marked with a Work Status marked 'Service Completed' and the Posting Status is not marked 'Posted'. **Only** Work Orders in a Posted status are included in billing.
Work Orders with Minimum	Displays a list of Work Orders where the Posting Status is 'Posted', the sum of the work order charges do not equal '0' and the total charge amount of the work order is less than or equal to the WO Minimum.
Work Orders with Revenue	Displays a list of all Work Orders in the billing batch that have revenue attached. Review this list to confirm the revenue amount displayed matches your expected revenue amount.
Work Orders with Zero Revenue *Review Important	Displays a list of all Work Orders in the billing batch that DO NOT have revenue attached. If no revenue is attached the work order will bill for $0.

Review: Service Changes

Review the Service Changes tab to verify the amount in the Rate Change column is correct. Incorrect amounts must be fixed on the account. By default, all service changes are displayed. Use the Filter field to limit the screen to only a specific set of service changes you would like to review.

Review: Manual Charges

Review the Manual Charges tab to verify the manual charges billing will include are correct. Charges that are incorrect, or missing, must be corrected/added on the account.

PRE-BILLING ANALYSIS							? ⊗

Work Orders	Service Changes	Manual Charges	Pending Approval Adjustments

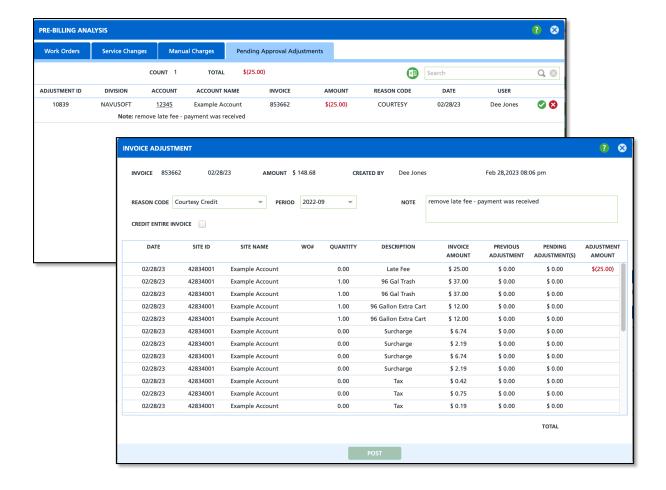COUNT 8   REVENUE   0.00   Search

DIVISION	ACCOUNT	SITE	CHARGE CODE	AMOUNT	QUANTITY	DATE	NOTE
CORPUS	Example Account 1 (33428)	Example Account 1 (33428001)	Adjustment-Residential	75.00	1	10/13/2022	MELTED CAN
CORPUS	Example Account 2 (48720)	Example Account 2 (48720001)	Residential Cart Delivery	55.00	1	11/07/2022	
CORPUS	Example Account 3 (32932)	Example Account 3 (32932001)	Cancel Fee	55.00	1	11/17/2022	
CORPUS	Example Account 4 (45795)	Example Account 4 (45795001)	Cancel Fee	55.00	1	11/17/2022	
CORPUS	Example Account 5 (42407)	Example Account 5 (42407001)	Cancel Fee	55.00	1	11/17/2022	
CORPUS	Example Account 6 (42458)	Example Account 6 (42458001)	Cancel Fee	55.00	1	11/17/2022	
CORPUS	Example Account 7 (32444)	Example Account 7 (32444001)	Cancel Fee	55.00	1	11/17/2022	
CORPUS	Example Account (47918)	Example Account (47918001)	Late Fee	10.00	1	10/01/2022	Please pay to avoid service…

Review: Pending Approval Adjustments

Review the Pending Approval Adjustments tab for outstanding invoice adjustments that have not been approved. Invoices will be billed for the original amount if an adjustment is rejected or still pending approval. The following actions can be taken for a pending adjustment:

- **Approve:** Select the green check mark to approve the adjusted amount for billing.
- **Reject:** Select the red 'X' to reject the adjusted amount and the account will be billed for the original amount.
- **Edit:** Double click within the row of an account to open the Invoice Adjustment editor to edit the Adjustment Amount.

Edit Adjustment Amount

1. Double click within the row of the account with a pending adjustment to open the Invoice Adjustment editor.
2. Click within the **Adjustment Amount** field and enter a new amount. Amounts must be entered as a negative value.
3. Select **Post** when finished and close the Invoice Adjustment screen.
4. Select the **Approve** icon from the Pending Approval Adjustments screen to approve the change for billing.

Related Articles

Billing Screen Overview

Create a Billing Batch

Billing - Process and Post a Billing Batch