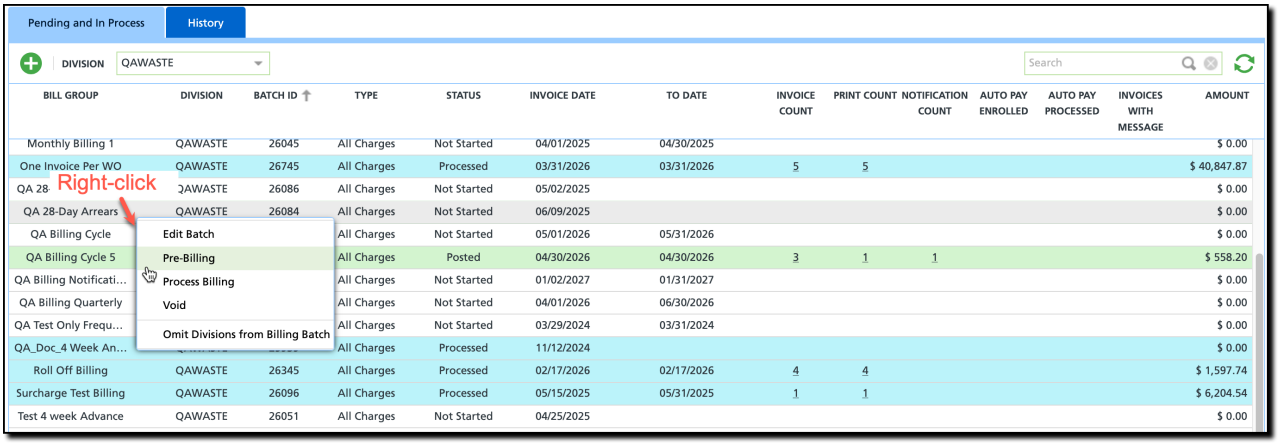
Pre-Billing Workflow

Last Modified on 06/25/2026 6:43 am PDT

Pathway: *Accounting > Billing*

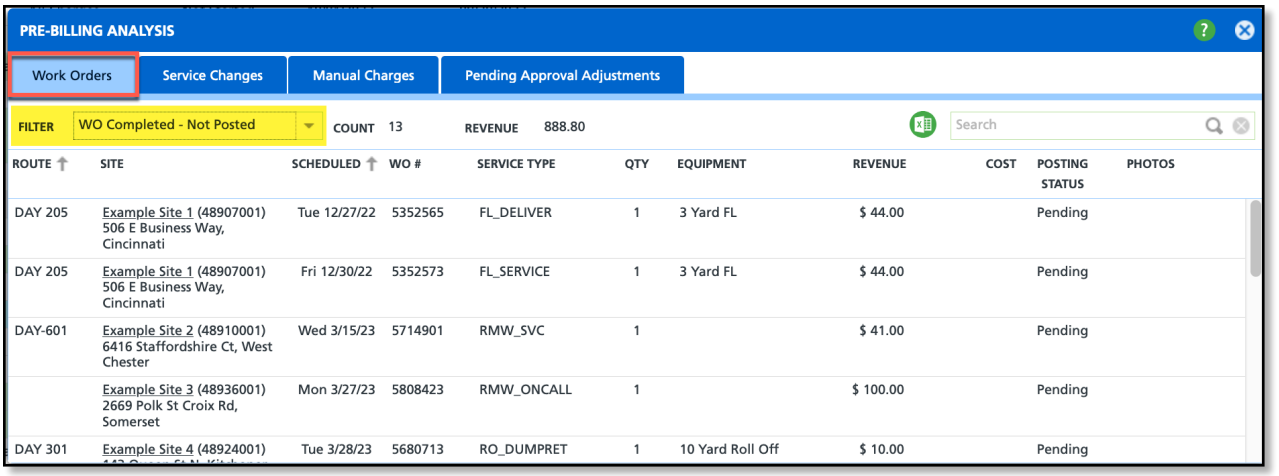
This article details the Pre-billing work flow that should be followed to prevent billing errors and revenue loss. This process is completed in the Billing tool for billing batches marked 'Not Started'.



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

Review Tab: 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



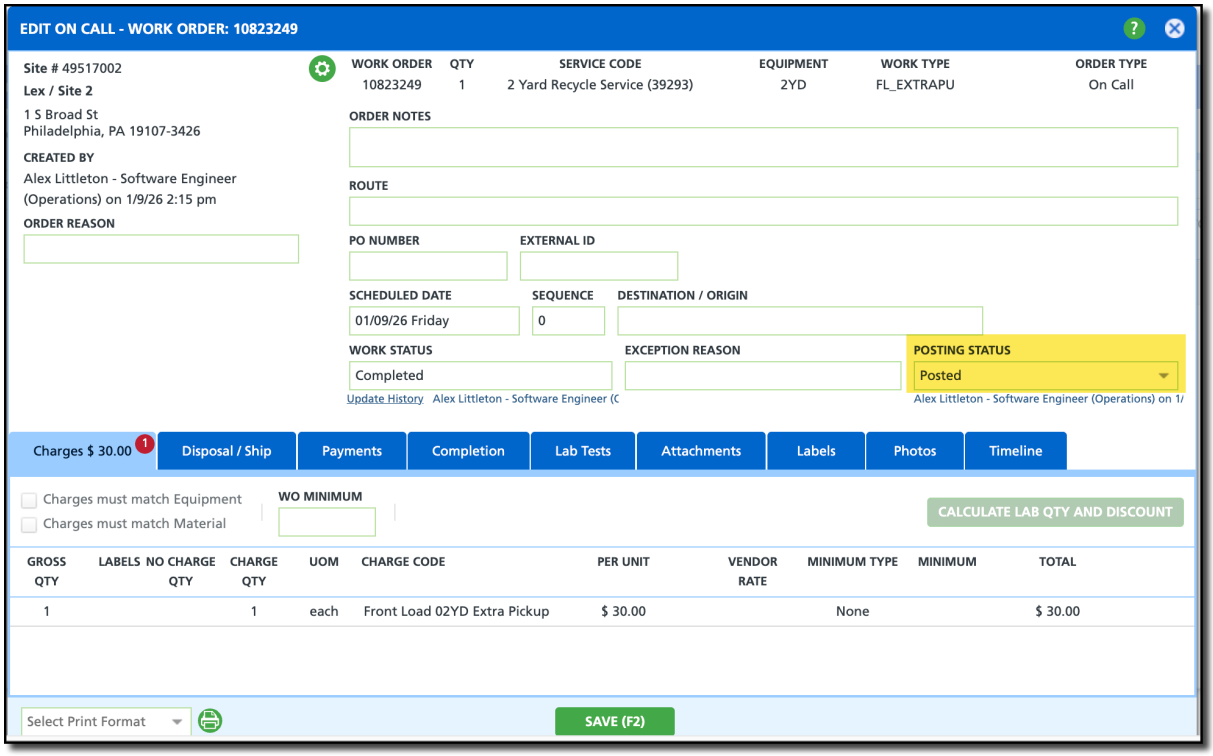
Filter Options

Filter	Description

WO Completed - Not Posted *Review Important	Displays a list of Work Orders with a Work Status of 'Service Completed' and a Posting Status of 'Not Posted.' Only Work Orders with a 'Posted' status are included in billing. Reviewing this ensures no revenue is overlooked. This correlates directly with the Operations > Dispatch > Work Order Posting list.
Work Orders with Minimum	Displays a list of Work Orders with a Posting Status of 'Posted,' where the sum of charges is not '0,' and the total charge amount 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.

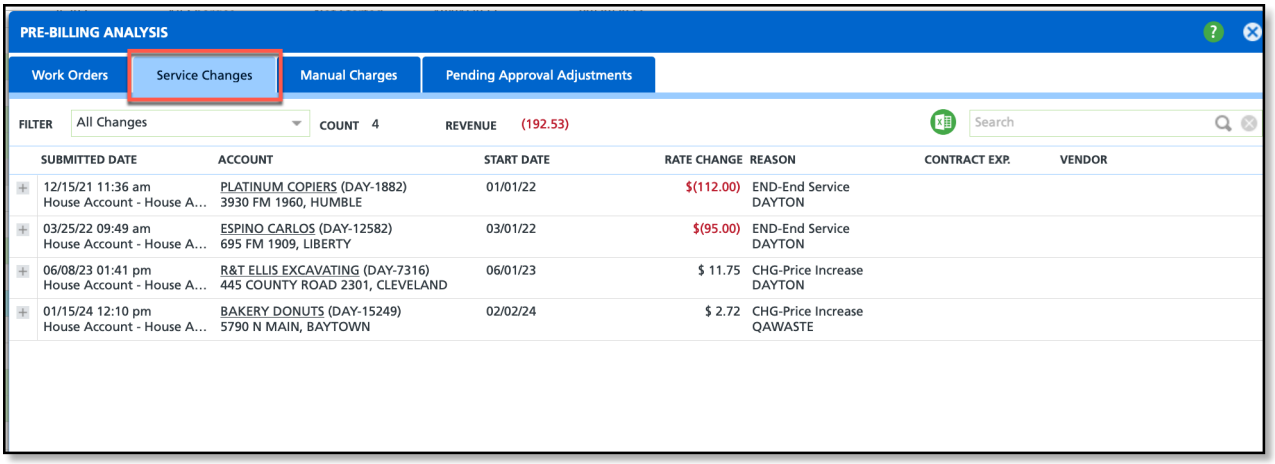
Review/Modify Work Orders

1. To investigate details about a work order, double click on a row to open the full service record.
2. Depending on the state and status of the work order and your permission settings, there are certain actions to take to resolve any billing issues identified.
    - For **all:** Review the work order details to determine if it is correct or not.
    - For **Completed but Not Posted:** Change the status to "Posted".
    - For **Minimum**, **With Revenue**, or **With No Revenue**: Modify as needed.
      To make any corrections, the work order cannot be in the "Posted" state. With the correct permission, this record can be moved back into "Pending" and then changes can be made.



Review Tab: Service Changes

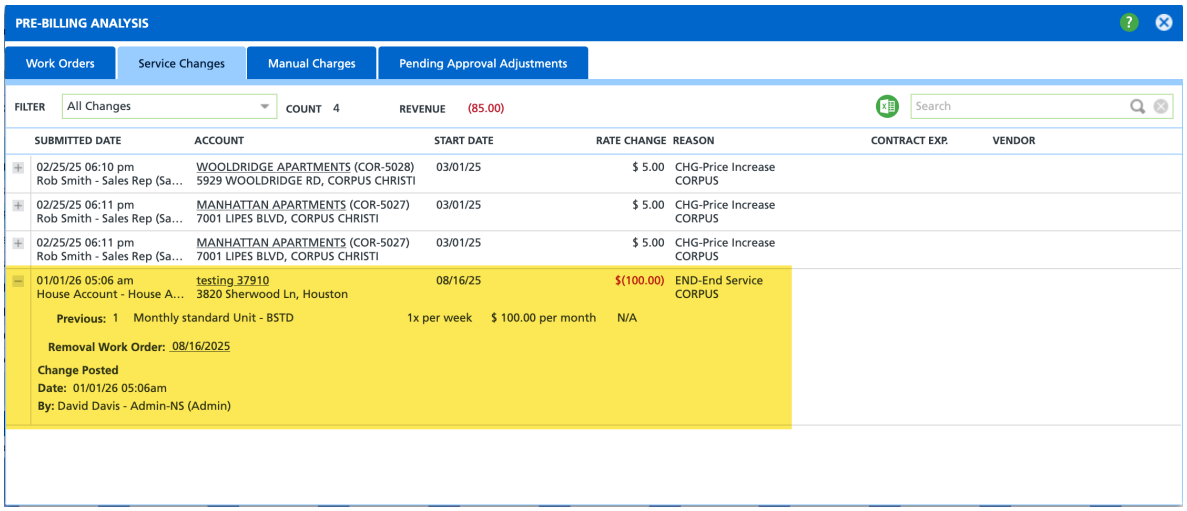
Review the Service Changes tab to verify the amount in the Rate Change column is correct. This tab represents if there were any changes that occurred to a service causing a rate change. Incorrect amounts must be fixed on the account.



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. The filter options are based on Reason Codes.

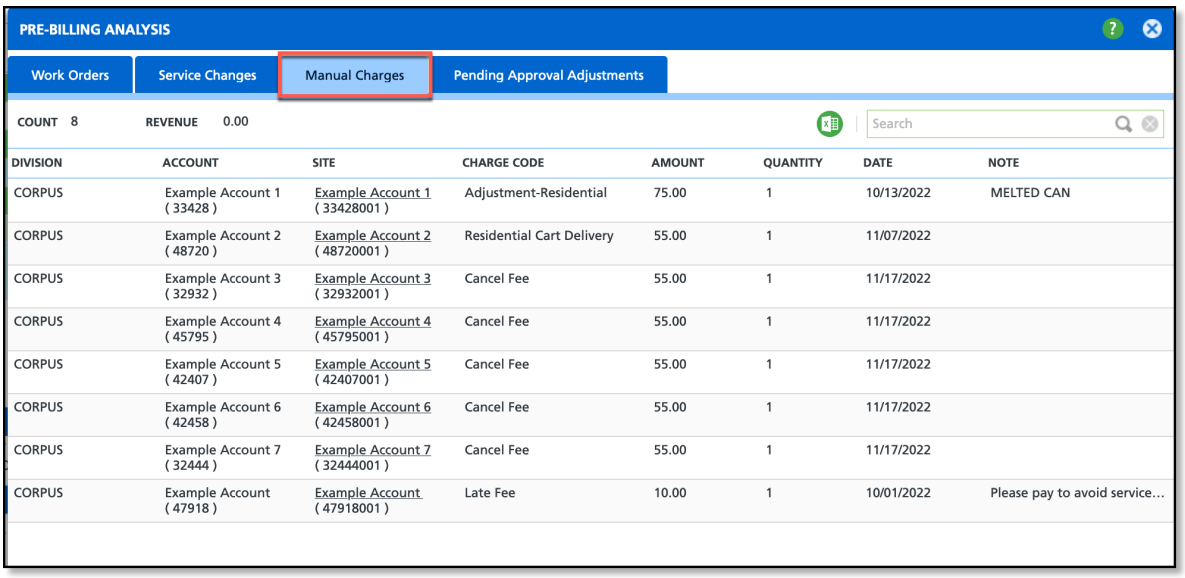
Review Rate Change

1. Double click within the row to view details about the rate change.
2. There are hyperlinks to the account and the work order (if applicable). Click on these for even more information.



Review Tab: 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.



Review Manual Charge

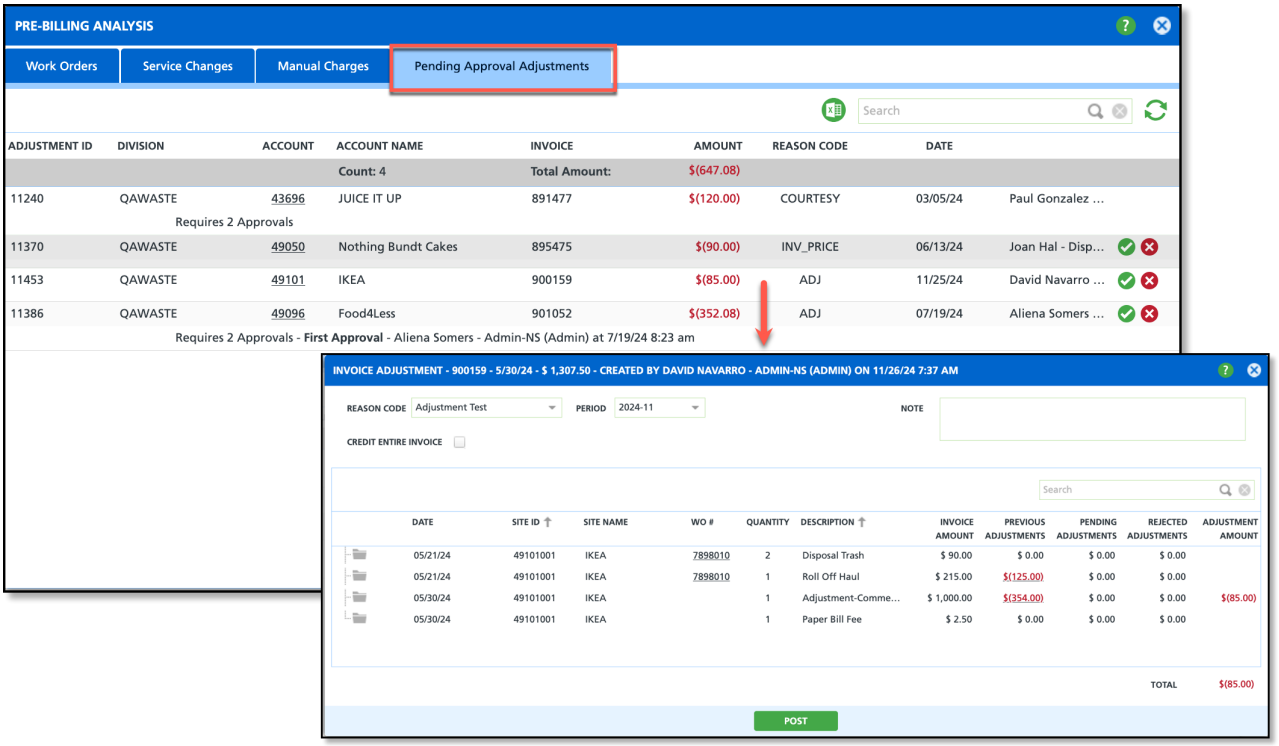
1. Review the Charge Code, Amount, Quantity and Date.
2. If something looks off or you just need to investigate further, click on the Site hyperlink and use the calendar to find the charge.
3. From the site, make changes to the manual charge if needed. Reload the page to confirm change.

Review Tab: 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.

If an **Adjustment Approval Limit** is defined in Role Setup, only adjustments within that limit will display approve/reject and edit options for the user. For further information about invoice adjustments review the Adjustment History and Pending Approval documentation.



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