

Biller Day.

Setup is somebody else's job. Yours is the line: pick the rate, type the NTE, read the margin, and know what a \$0 means. Five moves, each with the click and the proof.

The five moves.

#	DO THIS	WHERE	THE CLICK	PROOF IT HAPPENED
1	Pick the rate on a line	A Proposal, PO or invoice › Add Line Item	Type first (Task, Service, Labor, Material), then Name. The list is what the platform found for this Site, best fit on top. A Client or state in the name tells you which row it is.	The Rate fills itself. You did not type a price.
2	Check the Site before you trust the list	The same line	If the top rate looks wrong, change the Site on the record and watch the list change. Wrong Site, wrong rates.	The expected price is on top for the right Site.
3	Type the NTE at dispatch	The Trip form › Assignment › Vendor NTE	The NTE does not fill itself. Type the Vendor NTE on every Trip and put the instruction in the Trip description so the Service Provider sees it on the phone.	Every dispatched Trip shows a Vendor NTE. Nobody is surprised by a block.
4	Put the storm total on the Trip	The Work Order's Trips list › the snowflake	Per Event only. Pick the Weather Event, or type Total Accumulation Override. Many Trips: select rows on the Trips page › three-dot menu › Weather Event Override.	The snowflake is purple. Invoicing pulls the matching band; nobody picks a range Task.
5	Read the margin before you send	The draft Receivable	Save as draft. Read Markup amount and Work Order NTE at the foot. Under 15 percent margin is a wrong rate or an unticked Task, not a bad job.	Every sent Receivable was read as a draft first.

Reading a \$0 or a blank line.

YOU SEE	IT MEANS	DO THIS
\$0 on the Vendor side, price on the Client side	The Vendor column was never loaded for this Site, or the Vendor ticked a Task with no rate.	Do not type over it. Send it to whoever owns Pricing Setup with the Site and Service; they add the Vendor row.
\$0 on a PM Trip, price on an On Demand Trip (or the reverse)	Only one of the two prices on the rate row was filled.	Same. The row needs both prices.
No rate in the list at all	No row at any level for this Service and Site. Usually a Site with no Per Hour row, or a Service with no Generic row.	Same. Do not create a one-off price on the line; it hides the gap.
Another state's rate on top	The Zone lookup read the Client's state, not the Site's.	Pick the right row by name for today. Report it so a Site row is added.
A rate you know is stale	The row was never updated for the contract year.	Use it and flag it. Rates are changed by upload, not on the line.

The rules that do not bend.

RULE	WHY
Never type over a rate to fix it.	A typed price is invisible to everyone after you. The gap stays and the next biller hits it.
NTE on every Trip, at dispatch.	The check runs against what is typed. Blank is no check. Markup counts toward it.
Draft before send.	The margin is only readable on the draft. A thin margin is a wrong row, and a wrong row is on every future line until it is fixed.
Verify first, generate second.	Generate Payable on an unverified Trip returns nothing. That is the control working.

Questions? Contact your Customer Success team or email support@utilizecore.com.