Billing methods, *explained.*

A billing method is the rule that turns a Trip into an invoice line. There are **eight**, they do not all work the same way, and four more things sit in the same dropdown that are not billing methods at all.

APPLIES TO	EVERY TRIP CARRIES TWO	READ WITH	UPDATED
Department heads, billers, dispatchers	**One Client, one Vendor**	**Rate and Item Structure**	**September 2026**

01 They set the dollars

Five methods. Each one reads a rate table, and the rate it finds is the money on the line.

Per Task

HAS A RATE TAB

DEFAULT ITEM TYPE
Task

Per Service

HAS A RATE TAB

DEFAULT ITEM TYPE
Service

Per Hour (T&M)

HAS A RATE TAB

DEFAULT ITEM TYPE
Labor

Equipment Task Time and Material

HAS A RATE TAB

DEFAULT ITEM TYPE
Equipment Task T&M

Per Event

HAS A RATE TAB

DEFAULT ITEM TYPE
Snow Event

02 They carry no rate

Three methods. Each one takes its number from somewhere else, or caps what another method bills.

NTE

CAPS ANOTHER METHOD

Sits over whichever method is billing and stops it at the ceiling. It prices nothing itself.

no rate tab exists

Proposal

PASSES A NUMBER THROUGH

Bills the approved Proposal's own lines. The Trip contributes nothing to the price.

no rate tab exists

Non Billable

PASSES NOTHING THROUGH

No line at all. The Trip is still proof that the work happened, it is just not the price.

no rate tab exists

03 They are not billing methods

Four records that are not pricing rules. Three sit in the Trip dropdown; Agreement is reached through Scheduled

Agreement

Not in the Trip dropdown. The Scheduled Service agreement applies its billing method to every Work Order it generates, and writes to an Item Type of the same name.

Purchase Order

A cost control record raised against the Trip. It sits alongside a billing method, never instead of one.

Technician

A Trip type. It says who goes to the Site. The line is still priced by the method on that Trip.

Inspection

A Trip type. The inspection itself still bills Per Task or Per Service.

On screen, Per Hour (T&M) reads Time and Materials. Every Trip carries two billing methods: one for the Client Receivable, one for the Vendor Payable, and they do not have to match.

READ THE THREE ROWS THIS WAY

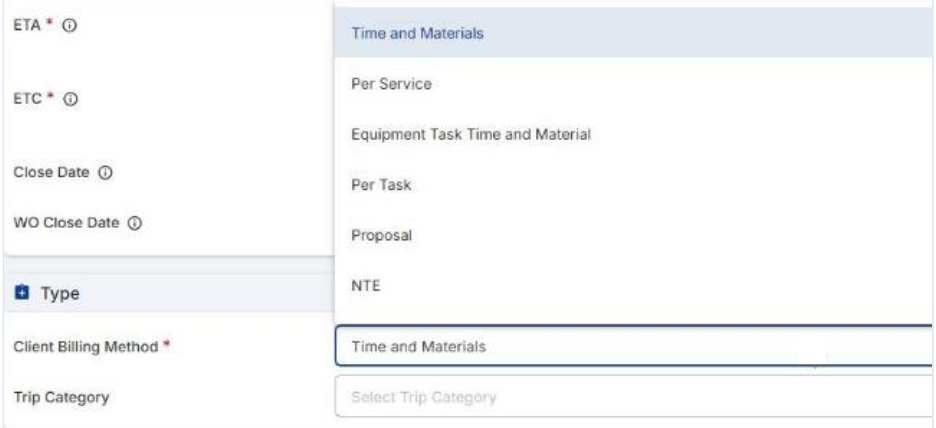
Row one is where the money is decided. Row two moves a number that was decided somewhere else, or puts a ceiling on it. **Row three is not pricing at all**, it is the record that carries a method onto a Service.

Seasonal is not a method. A fixed contract bills through a Scheduled Service agreement while its Trips run Non Billable.

The same list, *on a Trip.*

Client Billing Method on a new Trip in the test tenant. Ten entries. Seven of the eight methods are here, three of the four non-methods are here, and two things on page 1 are not.

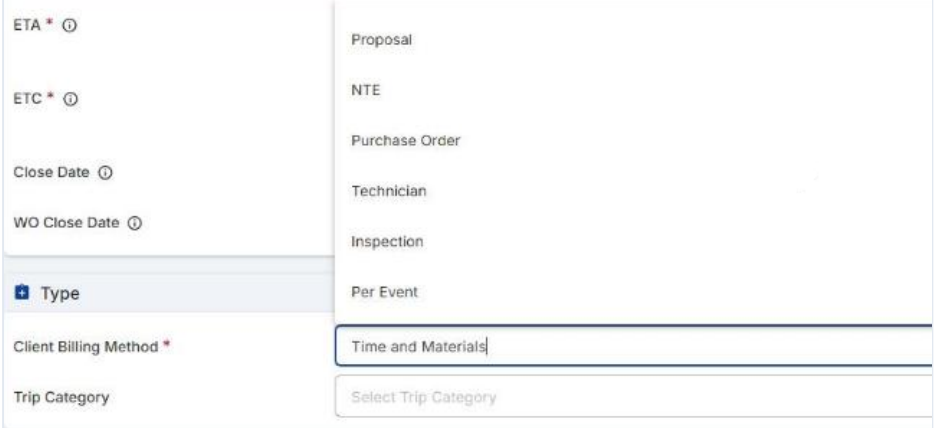
CLIENT BILLING METHOD, TOP OF THE LIST



Time and Materials is Per Hour (T&M). Equipment Task Time and Material is a first class entry, between Per Service and Per Task.

1. Time and Materials, Per Service, Equipment Task Time and Material, Per Task
2. Proposal and NTE sit in the same list as the rate bearing five

CLIENT BILLING METHOD, SCROLLED TO THE END



Purchase Order, Technician and Inspection are in the list and are not billing methods. Per Event closes it.

1. Purchase Order, Technician, Inspection: records, not pricing rules
2. Agreement does not appear here. It is reached through Scheduled Services, not this dropdown
3. Non Billable does not appear in this dropdown either. See the note below

Two things to verify against the screen. Non Billable is a real method and was not offered on the Client side of this Trip, so it is set somewhere other than here, most likely on the Service or the Work Order default. Agreement is an item type and is not in this list at all. Page 1 counts four non-methods; three of them are in this list.

READ IT AGAINST PAGE 1

Row one and row two of page 1 are both in this dropdown, mixed together, which is the whole reason the document exists. **Nothing on screen tells you which entries carry a rate.**

Captured on evanstestcompany, a test tenant carrying dummy data only.

What each one bills, and *what breaks it.*

The first five read the Trip against a rate. NTE caps whatever is billed. Proposal reads the quote instead of the Trip. Non Billable reads nothing.

METHOD	THE CONTRACT WORD	THE LINE ON THE INVOICE	WHAT BREAKS IT
Per Task READS A RATE	Per push, per application, per lot, per sidewalk, a price list by activity. In snow, per push is Per Task.	**One line per Task ticked at check-out, at that Task's rate on the Site. Unticked Tasks do not bill.**	A Task with no rate on this Site gives a $0 line. A Service Provider who ticks every Task by habit.
Per Service READS A RATE	Per visit, per trip, a flat amount each time the truck comes, whatever it does. Not per push.	**One line for the Service, per Trip. Quantity is editable on the invoice; the price does not depend on Tasks.**	No Vendor assigned to the Site with a priority, so the Per Service rate never populates. Assign first, price second.
Per Hour (T&M) READS A RATE	Time and materials, hourly plus parts, on-demand repair. Reads Time and Materials on screen.	**Check-in to check-out at the labor rate, regular, overtime or double, plus material lines, up to the Client NTE.**	A check-in from the road, or an Edit Visit with guessed times. The hours are the invoice.
Equipment Task Time and Material READS A RATE	Time billed against each Task rather than the visit. Equipment repair where every task is clocked on its own.	**One labor line per Task, from Task check-in to Task check-out or an entered total, multiplied by the technicians on that Task. Materials come from the repair form.**	No trade service rate means no line items at all, where Per Hour would at least give you blank ones. Minimum billable hours on the rate can override the clock.
Per Event READS A RATE	Snow range dependent: priced by the range the snow total falls in. Per inch is one inch ranges.	**The range the official snow total falls in, at that range's price, plus any Per Task Flat or Per Task Range add-ons.**	A Site with no weather id. Ranges with a gap, or that stop short of the storm. A flat per service price loaded here by mistake.
NTE NO RATE	Not to exceed, a cap, a fixed monthly pickup where the Trip count must not change the amount.	**Whatever is billed, up to the ceiling. Above it the Vendor invoice is blocked unless someone with the override permission approves.**	Vendor NTE left blank at dispatch, so there is no cap. Markup counts toward the check and can hide an exceedance.
Proposal NO RATE	Quote first, approved estimate, anything the Client signs before the work starts.	**The approved Proposal's own lines. The Trip contributes nothing. Profitability is read at the Work Order.**	Work done before the Proposal was accepted. A change on site with no revised Proposal.
Non Billable NO RATE	Included, covered by the seasonal, warranty, or the event Work Orders under a fixed monthly agreement.	**None. The Trip still needs check-in, check-out, photos and verification. It is the proof, not the price.**	Forgetting it. Both the agreement and the event Trips reach accounting and the Client is billed twice.

THE PATTERN BEHIND THE FAILURES

Six of these eight break the same way: **the method was set before the rate existed**. The method populates from a default and looks correct on the Trip, then produces a $0 line, or no line at all, days later at invoicing.

Set the rate first. Then set the method, then run one test Trip end to end.

Two separate questions: *which method, and which rate.*

The method inherits down four levels. The rate is found on its own ladder at invoicing. Neither one checks the other.

WHERE THE METHOD IS SET

Four levels. The most specific one that is filled wins.

1 The Service
Trip Level Default
Services and Rates, the Service, Trip Level Default. Answers most Sites.

2 The Site
Default Billing Methods by Service
View Service Rates. Overrides the Service for one contract.

3 The Work Order
Default Work Order Billing Method
Arrives filled from the Site, or the Service when the Site has no row.

4 The Trip
Billing Method, under Type
Most specific, so it wins. The Schedule block sits on the same form.

Both the Client and the Vendor method are set the same way, independently. A fixed-price Client with a per-push Vendor is normal.

AND WHERE THE RATE IS FOUND

Products and Services, Services and Rates, Rates and Assignees

FIVE TABS

Per Hour | **Per Service** | **Per Task** | **Equipment Task T&M** | **Per Event**

NTE, Proposal and Non Billable have no tab, because they read no rate.

RATE LEVEL	MEANS	WINS OVER
Site Assignee	This Vendor at this Site for this Service, with a priority	Everything, on the Vendor side
Site Generic	The Client price at this Site, no Vendor named	Client Generic and the Service generic row
Client Assignee / Client Generic	This Vendor for this Client everywhere, or the Client price everywhere	The Service generic row
Generic	The Service price with no Client or Site. What a new Client inherits	Nothing. It is the floor

TWO THINGS THAT SIT ON TOP

A Zone (state, county or zip) refines the generic row for a high cost area. And since 26 August 2026 the Item a rate points at is yours to choose, so a Per Service rate no longer has to name a Service item.

THE HALF LOADED SHEET

The single most common setup fault is a Site loaded with **Assignee rows only**. It works until the Vendor backs out, and then Proposals and invoices come up blank with nothing to fall back to. Load the Site Generic row for every Service sold, even at $0.00.

The download is the rollback. Export the filtered rows before any bulk upload.

The five tabs, and the *rate level column.*

Rates and Assignees. One tab per method that reads a rate. The Rate Level column on every row is the ladder from page 3.

RATES AND ASSIGNEES, PER SERVICE TAB



Five tabs, no NTE, Proposal or Non Billable tab. The Rate Level column names the rung: Site Generic, Client/Vendor Assignee, Vendor Generic, Site Assignee.

1. Five tabs, five rate bearing methods
2. Rate Level: which rung of the ladder this row sits on
3. Client columns, then Vendor columns, on the same row

EQUIPMENT TASK T&M TAB



Rows are per Task, not per Service, with a Minimum Billable Hours column the other tabs do not have.

1. Task column: the rate is on the Task. Minimum Billable Hours can override the clock

WHAT THE SCREEN PROVES

Every rate bearing method has a tab, and only those five do. If you are looking for where to load an NTE or Proposal rate, **stop, there is no such screen.**

Captured on evanstestcompany.

Your contract says it one way. *The platform says it another.*

Most billing errors start as a vocabulary error in the contract review, not as a mistake in the system.

YOUR CONTRACT SAYS	UTILIZECORE CALLS IT	NOTES
Per push, each time we plow	**Per Task**	Each push is a Task line at the Task rate. Per Service is not per push; a Per Service Trip with three pushes bills once.
Per visit, per trip, one flat amount each time	**Per Service**	One line for the Service per Trip, whatever was done.
Snow range dependent, a table by inches	**Per Event**	Needs a synced Site, and ranges with no gaps that run past the biggest storm.
A set price each time the service is done	**Per Service**	Not Per Event. Getting this wrong can block a whole billing season.
Per inch	**Per Event, one inch ranges**	There is no per inch method.
Per application, per lot, salt app, a menu of activities	**Per Task**	Every Task the Service Provider may tick needs a rate on the Site.
Hourly, time and materials, T&M, reg / OT / double	**Per Hour (T&M)**	Minimum billable hours, travel and a truck charge are set on the rate row or as a material line.
Billed by time on each task, equipment clocked separately	**Equipment Task Time and Material**	One labor line per Task, not one for the visit. Load a trade service rate or you get no lines at all.
Not to exceed, cap, up to	**NTE**	Client NTE on the Work Order. Vendor NTE on each Trip, typed at dispatch.
Quote, estimate, approved proposal, bid	**Proposal**	The Client NTE updates from the approved Proposal on accounts where that setting is on.
Seasonal, fixed monthly, flat for the season	**Scheduled Service agreement, Trips Non Billable**	Not a method. The agreement invoices, the Trips prove.
Included, warranty, courtesy, no charge	**Non Billable**	The Vendor side can still be billable.
PO required, we cut a PO before the work	**Any method, plus a Purchase Order on the Trip**	A Purchase Order is cost control, not a billing method, whatever the dropdown implies.

THE TWO THAT COST THE MOST

Per push is Per Task, never Per Service. A Per Service Trip with three pushes bills once. And **a set price each time the service is done is Per Service, not Per Event**; loading it as Per Event can block a whole billing season.

Read the contract with this table open before anything is configured.

Eight faults behind *most billing errors.*

Each one shows up at invoicing, days after the setup that caused it. Work backwards from the column that is wrong.

	WHAT YOU SEE	WHAT HAPPENED	THE FIX
01	**Proposals and invoices come up blank on a Site.**	Every rate was loaded as a Vendor assignee row and that Vendor backed out. No Site Generic or Client row existed.	**Load the Client price on the Site Generic row for every Service sold. Export, sort by assignee, fill, re-upload.**
02	**A monthly Client rate hit every completed Work Order.**	Generate Client Invoice was set to On Work Order Completion on a fixed monthly Client.	**Bill from the Scheduled Service agreement. Trips Non Billable on the Client side, Vendor per Trip.**
03	**An Equipment Task T&M Trip produced no invoice lines at all.**	No trade service rate existed. Per Hour would have given blank lines; this method gives none.	**Load the Equipment Task T&M rate before the first Trip, and check one Payable end to end.**
04	**Only one state's rates show for a Site in another state.**	The rate resolved to the Client headquarters state instead of the Site state.	**Label rates by state, for example Alarm - CA, and tell your Customer Success team which Site it happened on.**
05	**The rate dropdown is unusable.**	A labor item per rate type with no descriptive label, or a renamed Trade leaving the old name behind.	**Name items so they read in a list. Reset and reload from a clean sheet rather than fixing rows one at a time.**
06	**The Vendor exceeded the NTE and nobody caught it.**	Markup reset to zero after editing a line, or the NTE was never typed at dispatch.	**Type the Vendor NTE on every Trip. Check the total after editing lines, not before.**
07	**A quantity based flat price was loaded as hourly.**	Per Service was misread as needing Per Hour.	**Per Service gives the price. Edit the quantity on the invoice.**
08	**Vendors can see the target rates.**	Vendor rates on a Site are visible in the Vendor Portal.	**Move Vendor rates to the state or generic level, or accept the visibility. Confirm the toggle with your CSM.**

WHAT THEY HAVE IN COMMON

Seven of the eight are **rate faults wearing a billing method costume**. The method is usually right. The rate row it needed was missing, at the wrong level, or named so badly nobody could pick it.

One test Trip per Site type catches all eight before a client ever sees them.

NTE is a ceiling. *It caps a price, it does not set one.*

There are two, and they belong to different people. One caps what the Client will pay. The other caps what you will let the Vendor bill.

CLIENT NTE	What the Client will pay
WHAT IT IS	The total this Client will pay on this Work Order without a proposal for an NTE increase.
WHERE IT LIVES	The Work Order, under Financials. Read on every Trip form under it.
TO GO ABOVE IT	A proposal for an NTE increase, approved by the Client before the work.
THE GUARDRAIL	The Receivable warns. On an integrated Client the CMMS may reject the invoice outright.

VENDOR NTE	What you will let the Vendor bill
WHAT IT IS	The most you will allow this Vendor to bill on this Trip. Your ceiling, not the Client's.
WHERE IT LIVES	Each Trip, under Assignment. Typed at dispatch. It does not fill itself.
TO GO ABOVE IT	The Vendor asks you for an NTE increase, and you decide.
THE GUARDRAIL	The Vendor invoice is blocked until someone with the NTE override permission approves it.

Markup counts toward both ceilings. A $1,250 line carrying $100 of markup breaks a $1,300 cap.

WHY NTE IS ON THE LIST OF EIGHT AND HAS NO RATE TAB

As a billing method

Selected on the Work Order or the Trip, like any of the other seven. The ceiling itself is what carries through to the line.

As a field on both sides

Typed into Client NTE or Vendor NTE while a different method does the pricing. Per Hour bills its hours, and stops at the ceiling.

Either way, nothing to load

There is no NTE rate. Nothing to set up under Rates and Assignees, and nothing for a rate chain to resolve.

So a Per Task Trip that carries an NTE value still bills its Tasks. The NTE only stops it going higher. Choosing NTE as the method is the case where the ceiling becomes the price.

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

HOW TO USE THIS

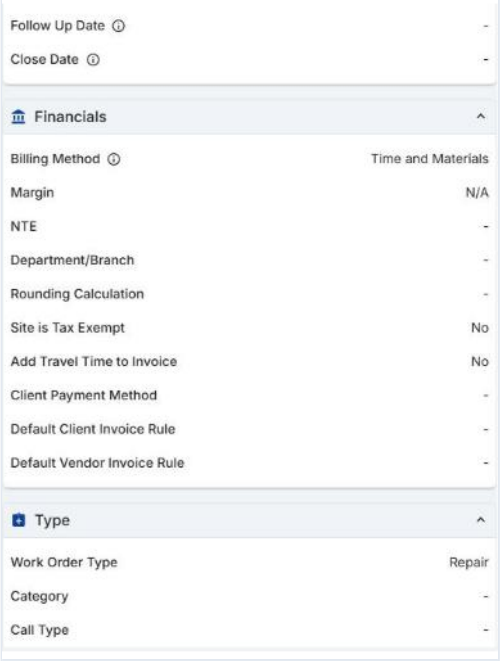
This is the **suggested best practice**, written for the most efficient and most widespread workflow we see across the base. It is a starting point, not a mandate, and it is adjustable to the way your own company runs.

If the screen and this page disagree, the screen wins. Tell your Customer Success team so this gets corrected.

Where the Client NTE *lives.*

The Financials block on a Work Order. The default billing method and the Client ceiling sit together, above the invoice generation defaults.

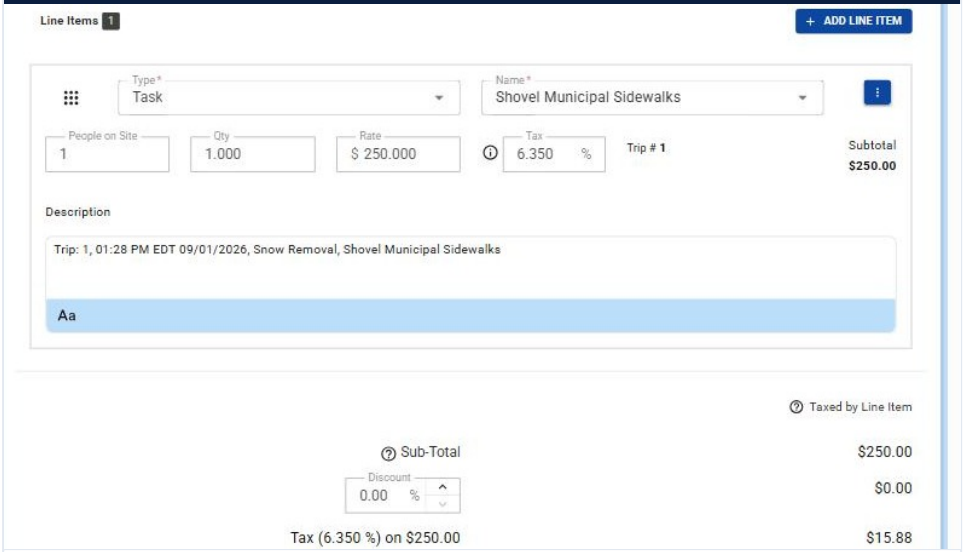
WORK ORDER, FINANCIALS BLOCK



Method, then Client NTE, then the invoice defaults. Blank NTE is no ceiling.

1. Billing Method
2. NTE
3. Default Client Invoice Rule

CLIENT RECEIVABLE, LINE ITEM AND FOOT



One line, one Trip. Type and Name are the Item Type and the Item. The foot of the same screen carries Markup amount and Work Order NTE as their own lines, which is where an exceedance shows.

1. Type and Name: the Item Type and the Item on the line
2. Rate, Qty, Tax and Trip number on the same row
3. Taxed by line item, not by invoice

Vendor NTE is typed on the Trip under Assignment once a Vendor is selected; it was not captured on this pass.

THE FIELD IS SMALL. THE CONSEQUENCE IS NOT.

A blank Client NTE is not a zero ceiling, it is **no ceiling**. On an integrated Client the CMMS can reject the invoice outright when the ceiling is crossed, days after the work.

Captured on evanstestcompany, Work Orders 3361869 and 6453652.