Invoice Dispute Resolution SOP & Workflow

Standard Operating Procedure (SOP) for Invoice Dispute Resolution

When a client disputes an invoice, it's crucial to handle the situation professionally, transparently, and efficiently. The following Standard Operating Procedure (SOP) outlines the steps to manage and resolve invoice disputes.

1. **Dispute Initiation:** Upon receiving an initial dispute from a client, direct them to the "Invoice Dispute Form" for detailed documentation of their concerns.

2. **Form Submission:** The client fills out the necessary details in the form, ensuring accuracy. Any supporting documents should be attached for clarity.

3. **Acknowledgment:** Confirm receipt of the dispute form within 48 business hours. This ensures the client knows their concerns are being addressed.

4. **Assessment by Business Manager:** The relevant Business Manager conducts an evaluation of the dispute. This involves verifying the authenticity of the invoice and understanding the root of the dispute.

5. **Contract Invoices Handling:** If the dispute involves a Master Contract Invoice (excluding PMs), redirect the concern to Lisa and the Client Concierge team for specialized handling.

6. **Invoice Adjustments:** Make any necessary adjustments to the invoice based on the evaluation. This may involve issuing a refund, sending a corrected invoice, or providing clarifications to the client.

7. **Communication with the Client:** Update the client about the resolution of their dispute. Ensure they are satisfied with the outcome and address any lingering concerns.

8. **Documentation:** It's crucial to maintain a record of all disputes, actions taken, and resolutions. This not only aids in transparency but also helps in improving future operations.

This SOP ensures a standardized approach to handling invoice disputes, fostering trust with our clients and ensuring efficient operations internally.

Invoice Dispute Resolution Workflow

This workflow outlines the step-by-step process for efficiently and effectively managing and resolving invoice disputes.

1. **Dispute Initiation:** The client expresses a concern or dispute regarding an invoice, and the company provides them with the "Invoice Dispute Form."

2. **Form Completion & Submission:** The client completes the form with the necessary details and submits it, attaching any supporting documents.

3. **Acknowledgment & Initial Review:** Within 48 business hours, the company acknowledges the receipt and conducts an initial review.

4. **Business Manager Assessment:** The form and disputed invoice are evaluated by the respective Business Manager. Additional details are gathered as needed.

5. **Contract Invoices Redirection:** Disputes about Master Contract Invoices (excluding PMs) are redirected to Lisa and the Client Concierge team.

6. **Invoice Adjustments & Actions:** Necessary adjustments to the invoice are made based on the evaluation.

7. **Client Communication:** The client is updated about the resolution of their dispute.

8. **Internal Documentation:** All actions and decisions related to the dispute are documented for future reference.

This workflow ensures a clear and organized approach to managing invoice disputes.