



Chapter 08: Administrative and Financial

01. Client Billing and Invoicing

Manage client billing and invoicing operations to ensure accurate charges and timely payment collection for all services.

Purpose

Establish a systematic approach to billing and invoicing that ensures accurate service charges, timely payment collection, and transparent financial transactions with all clients while maintaining excellent client relationships.

Roles and Responsibilities

Line Service Technician:

- Provide direct aircraft handling services
- Execute safety protocols during aircraft movements
- Document all services provided accurately
- Coordinate with ground support equipment
- Monitor safety compliance during operations

Finance Leader:

- Review and approve billing policies and procedures
- Oversee invoice accuracy and accounts receivable
- Monitor financial performance and budgets
- Ensure compliance with financial regulations
- Coordinate with external accounting services

Client Service Representative:

- Manage client communications and service requests
- Process documentation and billing
- Obtain client authorizations and approvals
- Coordinate scheduling and aircraft availability
- Maintain professional client relationships

Operations Leader:



- Oversee daily operations and coordinate between departments
- Authorize emergency response procedures and resource allocation
- Monitor safety compliance and operational excellence
- Coordinate scheduling across departments for operational coverage
- Review billing disputes and approve service adjustments
- Ensure regulatory compliance across all operations

Process Steps

Service Documentation Phase

- **Capture service details** - Record all services provided including fuel, hangar, maintenance coordination, and additional services
- **Verify service completion** - Confirm all requested services were delivered according to specifications
- **Document special requests** - Note any custom services or client-specific requirements that affect billing
- **Collect supporting documentation** - Gather fuel receipts, maintenance work orders, and service confirmations

Invoice Preparation Phase

- **Calculate service charges** - Apply current pricing for all services using approved rate schedule
- **Apply applicable discounts** - Process any volume discounts, loyalty program benefits, or negotiated rates
- **Review charge accuracy** - Verify all calculations and service descriptions before invoice generation
- **Add taxes and fees** - Include applicable state and local taxes per regulatory requirements

Invoice Generation Phase

- **Generate invoice document** - Create professional invoice using standard template and client information
- **Include service breakdown** - Provide detailed line items for transparency and client understanding
- **Attach supporting documents** - Include fuel receipts, work orders, or other relevant documentation
- **Verify client contact information** - Confirm current billing address and preferred delivery method

Invoice Distribution Phase

- **Distribute invoice promptly** - Send invoice within 24 hours of service completion via client's preferred method

- **Confirm receipt** - Follow up to ensure invoice was received and is accurate
- **File invoice copies** - Maintain organized records for accounting and audit purposes
- **Update account status** - Record invoice in client account and accounts receivable system

Process Mapping

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flowchart TD

A[Service Completion] --> B[Document Services]

B --> C[Calculate Charges]

C --> D[Generate Invoice]

D --> E[Distribute Invoice]

E --> F[Confirm Receipt]

F --> G[Update Records]

G --> H[Monitor Payment]

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Tools and Resources

- **Billing Software:** FBO management system with invoicing capabilities
- **Rate Schedule:** Current pricing for all services and applicable taxes
- **Invoice Templates:** Standardized invoice formats with company branding
- **Client Database:** Contact information and billing preferences
- **Service Documentation Forms:** Fuel tickets, work orders, service confirmations
- **Payment Processing System:** Credit card and ACH payment capabilities

Success Metrics

- **Completion Time:** Invoice generated and distributed within 24 hours of service completion.

Quality Standard: 99% invoice accuracy with less than 2% requiring corrections or adjustments.

Safety Standard: All fuel quantity documentation verified and reconciled before billing.

Client Satisfaction: 95% of clients rate billing process as clear and accurate in quarterly surveys.



Common Issues and Solutions

- **Issue:** Service charges disputed by client due to unclear documentation
- **Solution:** Provide detailed service breakdown with timestamps and supporting documentation. Review with client and adjust if warranted.

Issue: Delayed invoice generation affecting cash flow


Solution: Implement same-day billing for completed services. Use automated invoice generation where possible and establish backup procedures for system downtime.

Issue: Incorrect fuel quantities billed due to documentation errors


Solution: Require dual verification of fuel quantities by technician and supervisor. Implement digital fuel tracking system with automatic quantity capture.

Safety Considerations

 **WARNING:** Ensure fuel billing accuracy to prevent client safety issues from incorrect fuel load calculations

 **CAUTION:** Verify all service charges before invoice generation to maintain client trust and avoid billing disputes

 **NOTE:** Maintain confidentiality of client financial information and billing details at all times

 **BEST PRACTICE:** Provide detailed service breakdown on all invoices to support transparency and client understanding

Regulatory References

- **14 CFR Part 91** - General Operating and Flight Rules (fuel requirements)
- **OSHA 29 CFR 1910.106** - Flammable Liquids (fuel handling documentation)
- **State Sales Tax Regulations** - Applicable tax requirements for aviation services
- **Company Financial Policies** - Internal billing and collection procedures