



# Customer Service

## 6. Billing and managing payments

The fundamental purpose of a bill is to make it clear to the customer how much needs to be paid – in such a way that the customer can understand what they are paying for.

Bills can be in the form of:

- statements, invoices or bills
- accounts and renewal notices
- or in its most basic form, simply telling the customer how much they owe you!

In general they are sent in paper format, but increasingly they are being sent electronically.

Bills can relate to the 'one-off' cost of a product or service or its ongoing use. A bill can be for something already provided, or something that will be provided in the future.

The keys to successful billing all revolve around the simple concepts of 'no surprises' and 'ease'. The matters customers place considerable importance on for billing and payments include:

- being clear and easy to understand
- being accurate and including all the related costs
- arriving at the right time and location
- being an amount that they generally expected
- having a variety of convenient payment methods.

The key aspects in the billing activity include:

- providing the bill to the customer
- the format and content of the bill
- any inquiries, adjustments or corrections associated with the bill.

It is important to ensure that the bill is clear and easy to pay.

To assist you to do this, follow the checklist on the next page.

## Checklist - Billing and managing payments

### 1. Providing the bill to the customer

- ▷ When billing regularly, the frequency with which you send the bills should be in line with what best suits the customer.
- ▷ Your bill must arrive within the time expected by the customer.
- ▷ Ensure the bill is sent to the person at the correct location.

### 2. Billing format and content

- ▷ The bill must be clear and easy to understand, with no technical jargon, codes or abbreviations.
- ▷ The bill must contain any customer reference number they have provided to you or you have provided to them (ie quote number, order number, account number, job number etc) to allow matching of charges and allocation of costs.
- ▷ Your bill must be accurate and complete.
- ▷ Your bill must clearly specify what it contains, including:
  - the time period covered
  - a clear description of the work done, the goods/services provided, usage levels etc, with a summary of the total amount
  - information about any outstanding payments
  - any legal requirements.
- ▷ Your bill must clearly specify when payment is due and how payment can be made. You must give sufficient time for the customer to check the bill, approve it, and arrange payment.
- ▷ If the bill contains an agreed discount, the basis of the discount and how it is determined should be clearly outlined.
- ▷ Your bill should contain a contact telephone number for inquiries.

### 3. Billing inquiries, adjustments and corrections

- ▷ Any queries about the bill or payment must be handled quickly and fairly.
- ▷ If adjustments or corrections are required, prior to sending the amended bill you should contact the customer and tell them what corrections or adjustments have been made.
- ▷ Any agreed adjustments or corrections must be clearly outlined in the amended bill.
- ▷ For complex bills, a plain language guide should be made available to customers to help them understand the bill.

### 4. Bill payment

- ▷ Provide a range of convenient options for customers to pay your bills.

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We also provide services at the following locations:

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Port Lincoln,  
Port Pirie, and  
Whyalla

May 2006