

# Implementations - Discrepancy Audit Process - Licensing

12/21/2023 11:29 am EST

## Discrepancy Auditing

When properly filled out, the discrepancy sheet will accumulate the discrepancies present in the 4 fields that are currently being monitored. This data should be audited [Time Expectation] by a representative of the appropriate department for each discrepancy type to ensure accurate resolution or further escalation if needed.

## Identifying Additional Discrepancies

The initial discrepancy process is meant to identify accounts that possess basic discrepancies, while not adding significant time and disrupting the licensing process. During the audit process it is important to confirm and resolve the issues identified within the discrepancy log. There are also additional fields that should be observed and/or corrected during the audit process to assist in repairing the 3 tracking resources.

- Expiration Date - Licensing Sheet, License Master
  - Multiple differences with the Expiration date may be present between the License Master server and the Bold Billed Licensing Sheet.
- Account Ownership - CRM, Licensing Sheet
  - Within CRM there is an Ownership field in the upper right corner. This field is used to drive which License Tracking sheet the account should be recorded on. Generally, if an account is Bold-Billed, it will appear on the tracking sheet. Accounts that are not billed by bold will be recorded on the Non-Bold Billed license tracking sheet.

## Discrepancy Resolutions

Each discrepancy logged should also be reviewed for accuracy and correctness by the appropriate department before resolution. The intended resolutions are below.

- License Quantity - License Master and CRM should accurately reflect the Customers current active installation. The party responsible for billing the customer should verify that the customer is being billed for the current number of licensed accounts. If there is a difference in the Billed vs Licensed quantity, a billing or licensing change may need to occur.
- Account Number - License Master houses the Central Station ID, this should be identical to the customer number found in CRM. When these numbers are different, the responsible party should verify the correct number for use. The Account number in CRM can be changed, or the Central Station ID can be recorded into CRM for the customer.
- Expiration Date - Customer Accounts should be licensed to coincide with the Bold Billed licensing Sheet. The

responsible party should verify the customers actual billing end date and update the licensing sheet or bill the customer accordingly.

- Ownership/Licensing Sheet - Accounts tracked on either licensing sheet should have the correct ownership team that drives licensing sheet presence. The responsible party should verify if the account is Bold Billed, then assign the account to the appropriate team and correct the licensing sheet presence as needed.
- Other - These discrepancies will need to be handled on a case by case basis and may require cooperation between multiple departments.

## Department Responsibility

It is important that discrepancies are audited by and appropriate department for the discrepancy type. This will allow one department to resolve or further escalate a discrepancy efficiently and correctly. The following table serves as a general guideline to which department should be responsible for each discrepancy.

## Resolution Logging

After an issue has been resolved by the appropriate department, the resolution should be logged into the discrepancy sheet. This will allow visibility for what changes were made in resolution and can help drive process going forward as more entries are brought into the discrepancy identification process.

Auditors are responsible for filling in the following fields.

Intended Workflow