

Closed Won Opportunities 1X Fee Billing Follow-Up

06/12/2026 3:42 pm EDT

Purpose: notify Accounting when the one-time fee has not been billed within 48 hours of Closed Won.

Overview

When an opportunity is marked Closed Won, the system monitors the 1X Fee Billed Date field. If that field remains blank for 48 hours after the Closed Won Date, an automated email is sent to Accounting to prompt billing follow-up.

Accounting Requirements

Required accounting entry: RMR First Bill Date.

Verify this field is completed before final processing.

Billing Escalation Process

Trigger: 1X Fee Billed Date is blank 48 hours after the opportunity is marked Closed Won.

Timing: the 48-hour window is calculated from the Closed Won Date.

Notification: Accounting receives an automated email reminder that the one-time fee still requires billing action.

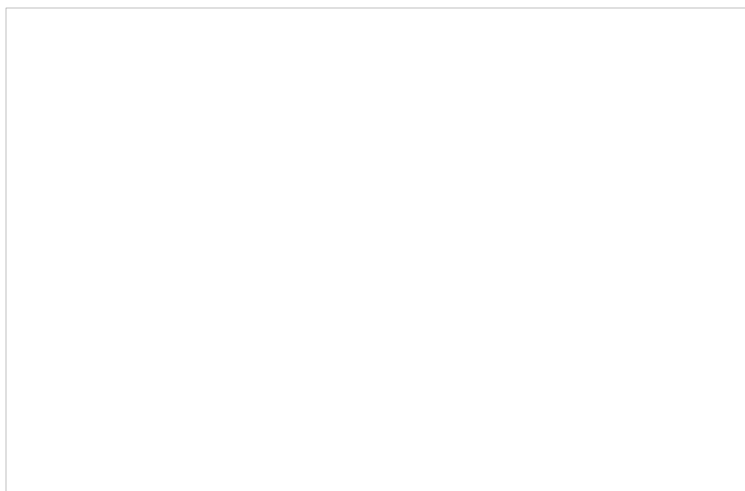
Follow-up: once billing is complete, Accounting must update the 1X Fee Billed Date.

Automated Email Template

Field	Content
Subject	Reminder: Billing Platform (Inside or Outside) - Sale FYR \$0.00 EverCommerce
Greeting	Hey Team,
Body	The 1x fee has not been billed and it has past 48 hours since the closed won date. If billing has already occurred, please update the 1x fee billed date (Closed Won Opps 1x Fee Need Bill Salesforce) that may have been missed during entry.

Reference	List the relevant fields from the original Closed Won email.
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Example of Email:



Salesforce Report to Enter in Required Field:

[Closed Won Opps 1x Fee Need Bill | Salesforce](#)