

# Updating the Closed Won Opportunities - 1X Fee Need Bill Report

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To ensure a seamless customer experience and facilitate timely project initiation, the Billing team must maintain accurate and up-to-date information in the Closed Won Opps – 1x Fee Need Bill Report. This information enables the RevOps and Professional Services teams to review payment status and begin customer projects as soon as applicable fees have been received.

## Step 1: Upon Delivery of the One-Time Fee (OTF) Invoice

After the OTF invoice has been sent to the customer, access the Closed Won Opps – 1x Fee Need Bill Report and complete the following fields:

- 1x Fee Billed Date – Date the invoice was sent to the customer.
- 1x Fee Paid Status – Current payment status of the invoice.
- 1x Fee Payment Due Date – Payment due date listed on the invoice.

**Note:** These fields must be updated immediately after invoice delivery to ensure visibility for RevOps and Professional Services.

## Step 2: Upon Receipt of Payment

Once payment has been received for the invoice associated with the opportunity/quote referenced in the report:

1. Return to the Closed Won Opps – 1x Fee Need Bill Report.
2. Update the following field:
  - 1x Fee Paid Date – Date payment was received.

## Step 3: Upon Project Completion and RMR Billing Initiation

After receiving the project completion notification and beginning Recurring Monthly Revenue (RMR) billing:

1. Return to the Closed Won Opps – 1x Fee Need Bill Report.
2. Update the following field:
  - RMR 1st Bill Date – Date the first RMR invoice is generated.

## Responsibilities

### Billing Team

- Ensure all required fields are updated accurately and promptly.
- Maintain report integrity throughout the customer lifecycle.
- Support timely project handoff and activation by providing current billing information.

## Importance

Timely completion of these report fields enables RevOps and Professional Services teams to efficiently manage project initiation and delivery. Accurate reporting helps ensure customers receive a smooth and positive experience from project kickoff through ongoing service billing.

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