Services Preprocessor

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Path: File > Services > Services > Services - Preprocessor Form

About

The Services Preprocessor combines eligible line items into a single bundled service, using the rules defined in Activity Code Bundle Setup. It applies only to services whose activity code is set up as a **Base Activity Code** in a bundle.

Before you begin

- The bundle rules must already be set up in **Activity Code Bundle Setup**.
- Recalc the services in the **Services Form** before moving to the **Services Preprocessor**. The services to be bundled must have a **Bill Status of 0**. Services with any other status will not appear in the preview.

Step 1: Set filters

1. Use the navigation path above to open the Services Preprocessor.
2. Enter a **Beginning Date** and **Ending Date** (required).
   Only services dated within this range are combined. A service outside the range won't be bundled with services inside it, so choose a range that covers every service you want combined.
3. (Optional) Click **Filters** to narrow the results further.

Step 2: Preview

4. Click **Preview**. Two grids appear:

Grid	Shows
Records To Be Bundled (top)	The new bundled service(s) that will be created, with the bundled activity code.
Base Records (bottom)	The original line items that will be combined into each bundled record.

5. Check both grids before you continue.

Step 3: Generate

6. Click **Generate**. A message shows how many records were generated.

After you Generate:

- The base records are **closed**.
- The generated services no longer appear in the Preprocessor, so they can't be bundled a second time.

To correct a bundle that has already been generated, see Correct Bundled and Base Line Items.

Step 4: Recalc

7. Go back to the **Services Form** and **Recalc** the generated services to Bill Status 0. **The line item for the bundled activity code is created only when you Recalc.** Until then, the bundle is not billable.