

NextStep Billing

Correct A Bundled Line Item

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Path: **File > Billing > Line Items**

About

If your agency uses the [Bundling Workflow](#), there may be a time when you need to correct a "Bundled" Line Item. Since "Base" Line Items cannot be edited, follow the steps below to delete the bundled items so they can be recreated instead of edited.

This workflow requires Security Permissions in NextStep Billing. If you are unsure if you have this permission, please contact your administrator or NextStep Support for assistance.

Delete the "Bundled" Line Item

1. Using the navigation path above, open the Line Items List
2. Enter your Line Item Form Filters
3. Select the "Bundled" Line Item that needs to be corrected and click **Ok**
4. Once opened to the Line Items Form, click **Delete**
5. Next, navigate to the Services Form
6. Enter your Services Form Filters
7. Select the "Bundled" Service that needs to be corrected and click **Delete**
 - **Note:** This will automatically trigger the "Base" Line Items to be reopened by the system. They must be *open* to show up in the Services Preprocessor.
8. You can now continue with the [Services Preprocessor](#) workflow

Alternative Workflow for pre-existing data (before 7.12.1 Release)

1. Using the navigation path above, open the Line Items List
2. Enter your Line Item Form Filters
3. Select the "Bundled" Line Item that needs to be corrected and click **Ok**
4. Once opened to the Line Items Form, click **Delete**
5. Click the **Line Items List** button to go back to the grid
6. Select the "Base" Line Item that needs to be corrected and click **Ok**
7. Once opened to the Line Items Form, click **Delete**
8. Repeat steps 6 and 7 as needed to delete all the "Base" Line Items associated with the "Bundled" Line Item
9. Next, navigate to the Services Form
10. Enter your Services Form Filters
11. Select the "Bundled" Service that needs to be corrected and click **Delete**
12. You can now continue with the [Services Preprocessor](#) workflow

