

Agero Billing 101

Your one-stop-shop when it comes to billing and payments in Swoop

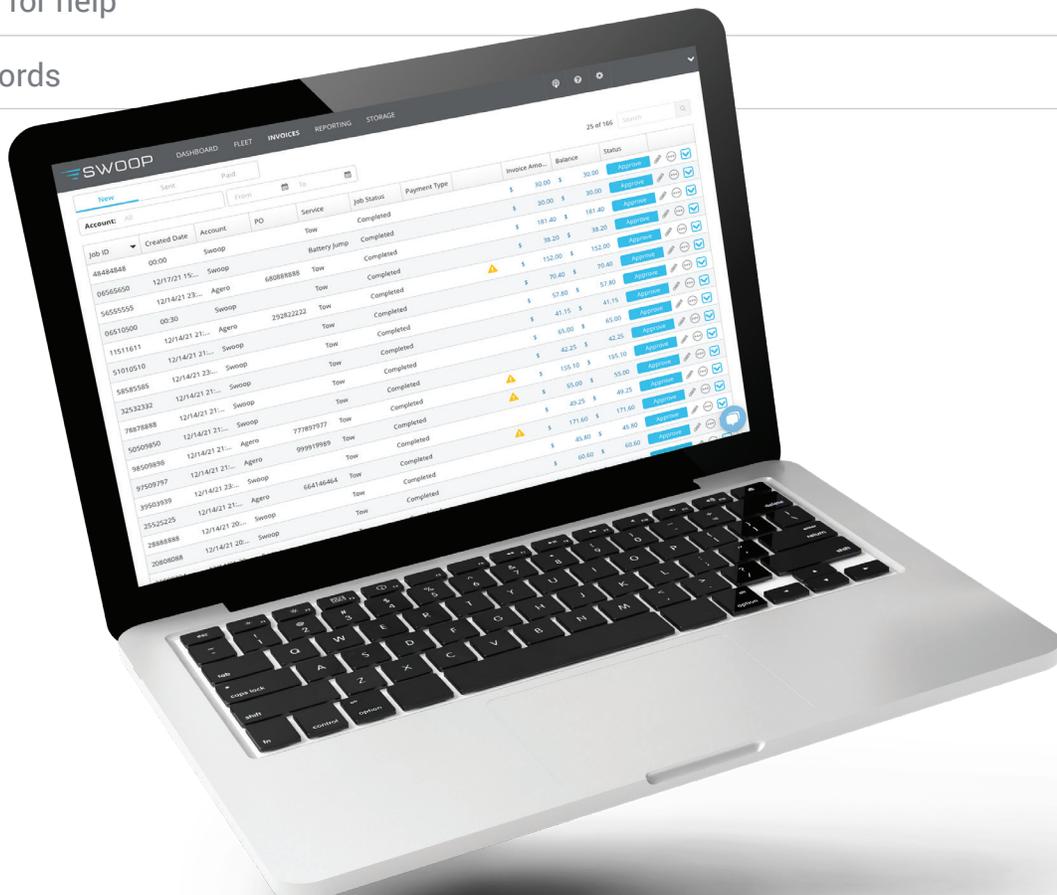
We understand that managing two billing systems can be challenging, so thank you for your flexibility and patience while we live in two worlds.

With the volume of Agero (Swoop) jobs growing, it is increasingly important that submitting and editing invoices in the Swoop billing dashboard is done correctly.



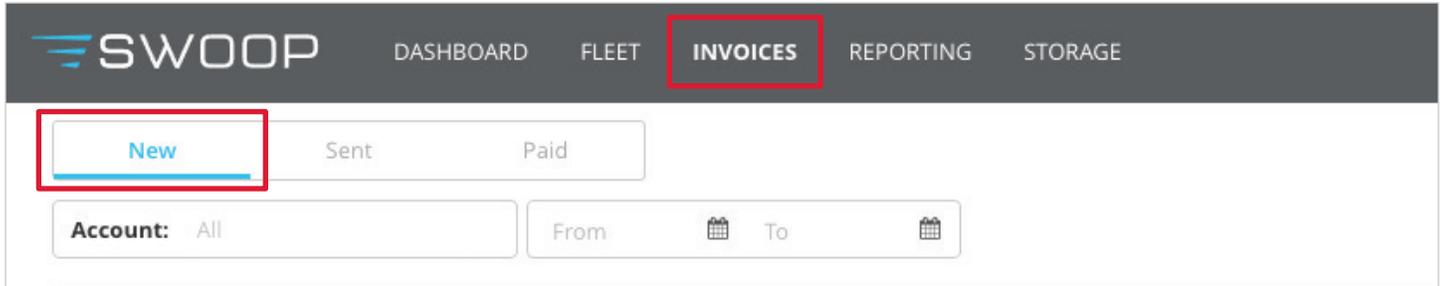
THIS GUIDE WILL WALK YOU THROUGH:

- + Submitting an invoice 2
- + Resubmitting a rejected invoice 3
- + When to submit your invoice, and what to expect 3
- + Reconciling payments 4
- + Where to turn for help 5
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How do I submit an Agero (Swoop) invoice in Swoop?

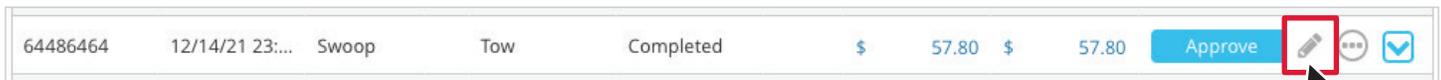
- + Login to Swoop from a desktop web browser (app.joinswoop.com/login) or via your mobile application
- + On your dashboard, navigate to the **Invoices** tab on the top menu. Select **New**:



- + In the **Account** text box, type 'Swoop' to filter only Agero (Swoop) jobs
 - Agero jobs will still populate on this tab, but should be submitted for payment through **AgeroSupport** or a third-party platform.
 - These jobs will display a **Yellow Hazard icon** indicating they cannot be submitted via the Swoop platform.



- + View and verify job details by clicking the event line item.
- + To edit an invoice, click on the **Pencil** icon on the far right of the line item:



THE MORE YOU KNOW

We highly encourage you to review each invoice for accuracy, carefully read any notes left by our Billing team, and provide your own, detailed notes as needed. The more information you can provide before submitting an invoice for payment, the quicker the review process will be.

- + Once you've reviewed the invoice and added any notes, you'll click the blue **Approve** button once, then the button will turn green, and you'll click a second time to **Send**:

Invoice Amount	Balance	Status	
\$ 100.00	\$ 0.00	Approve	  
\$ 15.00	\$ -85.00	Approve	  
\$ 10.00	\$ -90.00	Approve	  
\$ 15.00	\$ -85.00	Approve	  

Invoice Amount	Balance	Status	
\$ 100.00	\$ 0.00	Send	  
\$ 15.00	\$ -85.00	Approve	  
\$ 10.00	\$ -90.00	Approve	  
\$ 15.00	\$ -85.00	Approve	  

How do I know if an invoice has been rejected, and what do I do?

- + As you review **New** invoices, those that need additional attention will have **Grey 'X'** icon under an unnamed column, to the left of the invoice amount:

8218282	12/08/21 13:28	Swoop	Tow	Completed		\$	100.00	\$	0.00	Send			
7017070	12/08/21 13:11	Swoop	Tow	GOA		\$	15.00	\$	-85.00	Reapprove			
8118181	12/08/21 12:32	Swoop	Tow	GOA		\$	10.00	\$	-90.00	Approve			



When you hover over this icon, you will see additional details regarding this rejected invoice, with notes left by Agero's Billing team:

8218282	12/08/21 13:28	Swoop	Tow	Completed			100.00	\$	0.00	Send					
7017070	12/08/21 13:11	Swoop	Tow	GOA		<div style="border: 1px solid black; padding: 2px;">Swoop Rejected Invoice Reason: Add Charge Exempt</div>		\$	15.00	\$	-85.00	Reapprove			
8118181	12/08/21 12:32	Swoop	Tow	GOA				\$	10.00	\$	-90.00	Approve			

- + To attempt to receive payment for rejected invoices, you must take action based on the notes before clicking **Re-Approve**. To edit the invoice, click on the **Pencil** icon.
 - If you attempt to submit a rejected invoice without editing, it will not be processed. Some edits require PAG assistance, so please read the notes carefully.
- + Once you've edited the invoice, and assuming the notes do not indicate otherwise, select **Re-Approve** and then **Send**.

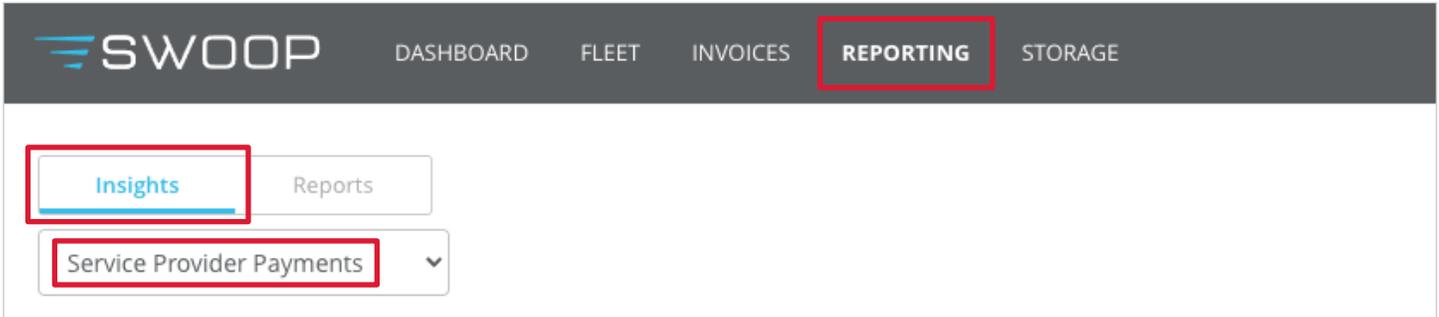
When do I have to submit my invoices?

- + Submit invoices by **11:59 PM EST on Sunday night** to receive payment the following Wednesday.
- + You have **60 days** from the original service date to submit an invoice, and **30 days** from the date you are paid to submit for any additional payments.
 - Any invoice that is edited is subject to a **15-business-day** review period.
 - You can review jobs that are under review under Invoices, in the **Sent** tab:

SWOOP												
DASHBOARD		FLEET		INVOICES		REPORTING		STORAGE				
New		Sent		Paid								
Account: All		From		To		4 of 4 <input type="text" value="Search"/>						
Job ID	Created Date	Account	PO	Service	Job Status	Payment Type	Invoice Amount	Balance	Status			
1818118	12/08/21 13:28	Swoop		Tow	Completed		\$ 100.00	\$ 0.00	Under Review			
2112121	12/08/21 11:59	Swoop		Tow	Canceled		\$ 0.00	\$ -100.00	Under Review			
4339443	12/20/19 10:52	Swoop		Battery Jump	Completed		\$ 100.00	\$ 0.00	Under Review			
3939339	12/20/19 10:36	Swoop		Battery Jump	Completed		\$ 0.00	\$ 0.00	Under Review			

How do I reconcile payments that have been rejected?

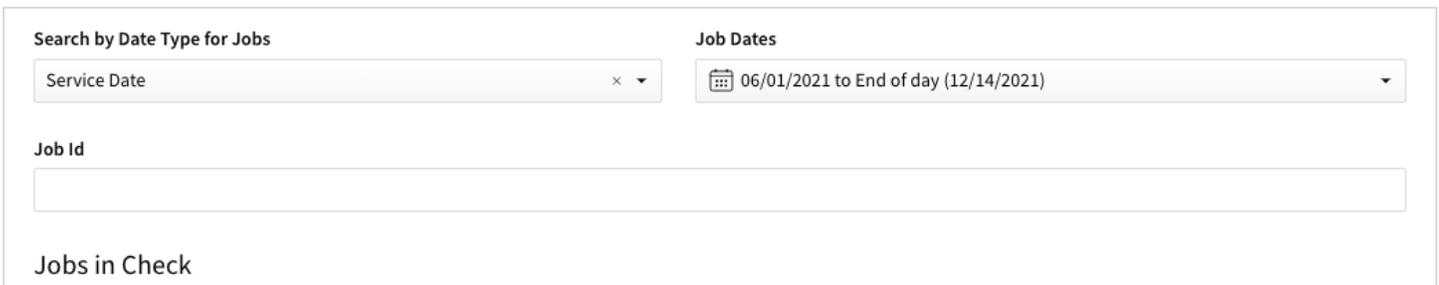
+ Go to **Reporting**, then **Insights**, then select **Service Provider Payments** from the dropdown menu:



+ The easiest way to review payments is to filter by **Check Number** or **Payment Date** range:



+ Navigate to the **Jobs in Check table** to view individual jobs associated with the selected check:



+ For jobs **Under Review/Rejected**, you'll see instructions in the **Notes** column on how to adjust those invoices.

Who do I contact when I need help?

The quickest way to address most questions is through our self-service portal. You can search the FAQs in the [Agero Knowledge Base](#) for answers to common questions.

The **Provider Advocate Group** is here to help with any billing inquiries or concerns you may have. They are available on weekdays from 10:00am - 6:00pm EST. There are a few ways to get in touch with them:

- + **Chat:** For a response in minutes, connect with PAG via the blue chat bubble in the Swoop desktop app, on AgeroSupport, or within the Help Center.
- + **Online:** [Submit a ticket](#) and receive a response within one business day.



We are actively working to enhance our resources on billing processes, including the creation of new videos and instructional guides. Stay tuned!

Thank you for your continued patience as we work within our two systems and adjust and grow our Swoop platform.

Frequently Used Terms and Phrases:

When navigating the Swoop billing dashboard, it's important to understand the variety of terms and phrases we use when it comes to billing:

- + **'Agero' Jobs:** Jobs from Agero's older platform – Agero Support. We are actively working on moving all of our jobs over to the Swoop platform. This is a big undertaking, one that will take quite a while to complete. In the meantime, we need two job labels – “Agero” and “Agero (Swoop)”
- + **'Agero (Swoop)' Jobs:** Agero jobs dispatched through the Swoop platform. You will see more and more of your jobs labeled “Agero (Swoop)” as we continue to move clients from our old platform to Swoop.
- + **Approve Invoice:** Initial submission of an invoice. This is step one of two. You must also hit “Send” to complete your invoice submission.
- + **Send:** Final step in submitting an initial or re-submitted invoice.
- + **Re-Approve Invoice:** Re-submission of an edited invoice. Remember, you must first edit the invoice before resubmitting or it will be rejected.
- + **Account Received:** Approved invoice has been received by Agero's billing team.
- + **Account Approved:** Invoice amount has been approved by Agero's billing team.