

What are rollups?

Rollups are a group of entries, similar to how an invoice would include a specific set of entries. Rollup functionality allows a quick view of every rollup in the system along with the current status. Included entries are determined by the rollup setting on the service code. This field is called **Billing Rollup Type** and pertains to the ID number listed per client per service code on the billing file and report. They include:

- None - Each entry has a unique billing rollup ID number
- Daily - Entries with the same date, service, and client have the same billing rollup ID number
- Weekly - Entries in the same week for the same service, for the same client, have the same billing rollup ID number
- Monthly - Entries in the same month for the same service, for the same client, have the same billing rollup ID number

There are two rollup reports available. To access:

1. Select **Reports** from the main menu
2. Select **Billing Reports** from the submenu
3. Select either **Rollups Report** or **Rollups Details Report** from the flyout menu

Please see the Reports Guide in the Help Center for more information.

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