

# Beyond Green Solutions, LLC

*Uniting Collections, Empathy, & Technology*

## Inventory Reconciliation

### Client Portal

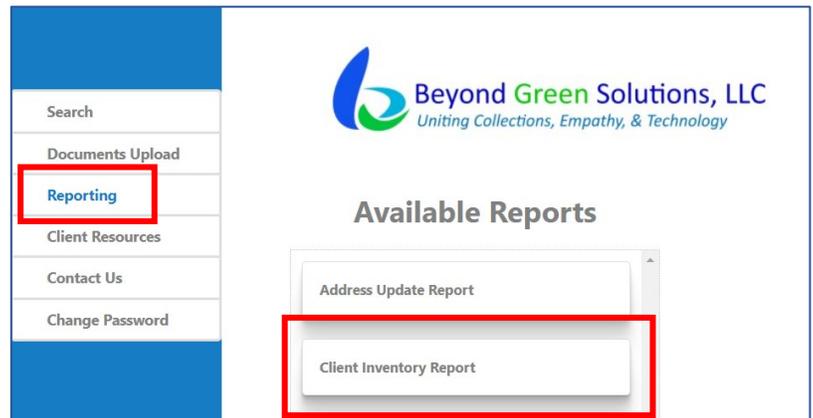
Beyond Green Solutions (BGS) [Client Portal](#) allows businesses to view, modify, and upload account information 24/7. It is fully integrated with the system of records, with changes taking effect almost immediately for our team to react to.

### Inventory Reconciliation

Inventory reconciliation is the process of comparing your active accounts at Beyond Green Solutions with your system of record. This ensures we are aware of payments or adjustments made in your office and we are only actively communicating with the appropriate list of consumers.

### Open Beyond Green Solutions Active Account List

1. Navigate to the **Reporting** Page
2. Click **Client Inventory Report**
3. Click **Download Report**
4. Open the report once it appears in your browser



### Reconcile

1. Add columns labeled "Our Current Balance" and "Notes."
2. Review each account against your system of records and enter the balance in your office in the **Our Current Balance** column.
3. If there is additional information, add it to the Notes column. Examples include a date of payment received in your office, insurance resubmission information, request to discount the account, or request to close the account.

Please reach out with any questions to [ClientServices@beyondgreensolutions.com](mailto:ClientServices@beyondgreensolutions.com)!

