

Invoicing Overview

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Invoices created in SedonaOffice are posted to the general ledger in a “real time” manner. This means that when the User presses the Save button on an Invoice form, it is immediately posted to the general ledger and the customer’s accounts receivable is updated. The only exceptions to the real-time posting is Cycle Invoices and Finance Charge Invoices. Cycle Invoices and Finance Charge Invoices are created in a batch and posted as a batch to the general ledger and the customer’s accounts receivable. If sales tax applies, taxes are automatically calculated based on the tax group associated with the site and the items or parts selected on the Invoice. For more information on how sales tax is calculated by the application, please refer to the topic in this document titled Sales Tax.

There are four types of Invoices that may be generated for a customer; Cycle Invoices, Service Invoices, Job Invoices and Miscellaneous Invoices.

- Cycle Invoices are created in batches and posted at one time as a batch.
- Service Invoices are generated from service tickets; this invoicing process is covered in the Service Module section of this help.
- Job Invoices are generated from the Job Invoicing Queue; this invoicing process is covered in the Job Management section of this help.
- Miscellaneous Invoices are used when you need to Invoice a customer for miscellaneous services, over the counter part sales, or other charges. Miscellaneous Invoicing is covered in this Accounts Receivable section of help.