Bill To

When highlighting the Bill To menu option from the customer tree, the Active Pane will display a list of all Bill To records that exist for the Customer.

Bill To records are mailing addresses that are used for customer invoices and/or statements. Each customer may have up to 5,000 unique Bill To addresses on file; only one of these must be flagged as the Primary Bill To on the customer account.

When setting up a Bill To record, you can select which types of invoices will use this billing address. If Cycle, Install, Service, and Miscellaneous invoices are to be sent to different Bill To's, you will need to set up four separate Bill To records first, then mark each Bill To with the type of invoice(s) to which it applies.

Each Site on a customer record must be linked to a Bill To record. This is considered the default Bill To for the Site. If you have more than one Bill To set up on the customer, you may select a different default Bill To for each Site.

Recurring lines are also linked to a Bill To record. When setting up a new recurring line, the Bill To for the Site [to which the recurring line is attached] will be defaulted. This may be overridden to select a different Bill To if necessary.

When expanding the customer tree for the Bill To record, the option labeled Contacts is listed. These are considered Billing Contacts; you may have multiple contact names listed for any Bill To record.

If more than one Bill To exists on the customer, a tree of options is displayed under each Bill To record. These options will be discussed below.

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When a customer has more than one Bill To, a tree of folders is displayed below each Bill To record. These folders show the activity for each unique Bill To record. When clicking on any of the folders, if any data exists for that Bill To, information will be displayed in the active pane of the Customer Explorer.

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When right-clicking on Bill To within the Customer Tree and selecting the New Billing Information option, a blank Customer Billing form will be displayed. Fill in the form then click on the Save button when finished.

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