Invoice a Single Ticket

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Service and Inspection Tickets are invoiced individually from the Billing form of the Ticket. The only exception to this is companies using Group Tickets or using the Batch Invoicing feature in SedonaSchedule. For more information on Batch Billing, click on the link.

Typically, either a staff member in the Service Department or the Accounting Department will review all Tickets prior to invoicing to ensure that all charges and costs have been accounted for on the Ticket. The person who actually creates the invoice is determined by your internal company policies and procedures and providing the users with the appropriate permissions to do so.

If your customer System records have accurate Warranty codes, warranty start dates, and correct Service Levels assigned, charges will automatically be calculated by the software. The person performing the invoicing is a second set of eyes to make certain the charges that were automatically calculated fit the particular situation for the Ticket.

Special Notes:

If there a special circumstances with a Ticket, and you do not want to accept the system calculated charges, a user may override the Warranty and/or the Service Level, and make manual changes to otherwise non-billable charges. Permissions are required to override the Service Level and the ability to make manual changes to labor charges.

Override Warranty and/Or Service Level

To be able to override the Warranty and/or Service Level calculations, you must first navigate to the Service Ticket tab and clear out the Resolution code and save.

Next navigate to the Billing tab and you are able to check the override the Warranty and/or Service Level checkboxes (upper left of the form).

Note: User Group Permissions are required to create an invoice, and to be able to modify labor charges and override the warranty and/or service level automatically calculated charges. Permission is also required to be able to close a Ticket.

If it is determined that the Ticket has billable charges, you will need to navigate to the Service Ticket Tab and select a Resolution Code that is flagged as billable, otherwise you will not be able to create an Invoice for the Ticket.

Finding Billable Tickets

A list of Tickets ready to be Invoiced or closed is available from a list within the Ticket Queue - this is referred to as your Billing Queue. Tickets will appear in the Billing Queue only if a Resolution Code has been selected and saved to the Ticket. Billable and Non-Billable Tickets will be listed in the Billing Queue.
To view the Billing Queue, from SedonaSchedule, click on the Ticket Queue button located in the Arrangement ribbon group.

The Ticket Queue will displayed. Above the Ribbon, click on the Queue Menu Tab.

The Queue Ribbon labeled View will be displayed. Click on the Resolved button within the ribbon. In the example below, we have selected the Queue View of All Tickets.

Any type of Ticket, that is resolved and ready for Invoicing is listed.

If you want to Invoice different Ticket Types separately, click on the Queue View drop-down list and select the desired Ticket Type.

At the bottom of the Ticket List a count of how many tickets are ready to be Invoiced and/or closed is displayed.

You will open each Ticket, Invoice and Close until no Tickets are left in the list.

Before Invoicing and closing any ticket, the user should review several items for accuracy prior to invoicing. Your company may want to create a "cheat sheet" to use until you are comfortable with the process of reviewing tickets that need to be invoiced.

Items to Review

- Ticket Custom Fields - make certain all have been populated according to your company's policies and procedures.
- Ticket Appointments - make certain:
    - All appointments have been fully dispatched.
    - Verify the dispatch times are correct.
    - If there are scheduled appointments that were never performed, delete these.
- Documents - Make certain any pertinent documents have been attached to the ticket according to your company's policies and procedures.
- Notes - Read all ticket notes. If the technician indicated that new parts were installed or parts were replaced, check the Equipment and Parts tab to make certain the parts were put on the ticket.
- Equipment and Parts - Make certain all parts used by the technician are listed. If existing parts were replaced, make certain to perform the part replacement function.
- Journal -
    - Review the Journal Detail to make certain no unexpected expenses were recorded against the ticket.
    - Review the Parts Reconcile to make certain all parts have been properly issued to the ticket.
- Other Items - If Other items were added with a zero sales price, make certain this is accurate. If there should be Other Items and they are not listed, add them.
- Purchase Orders - If any purchase orders were created for the ticket, make certain they are all marked as Closed. If not, and the parts or expense items were received, perform the Receive PO transaction.

Once you are satisfied with the ticket review, navigate to the Ticket Billing tab. All charges are automatically calculated for Labor, Parts, and Other Items will be displayed on the right side of the form. Verify the amounts for accuracy.

On the lower left of the Billing form, you have a few options before clicking the Create Invoice button:

- Contact Name - You have the option of selecting a Contact Name from the drop-down list (if any) which would be the Attention To on the invoice - this is optional.
- Invoice Date - The Invoice date will default to today's date; this may be changed if necessary as long as the date entered is in an open accounting period.
- Add Resolution Note to Invoice - If you want to include the Resolution Note in the Invoice Memo field, select this option.
- Close Ticket After Invoicing - If this option is selected, once the Create Invoice button is clicked, the invoice will post and you will be returned to the Ticket Queue to work on the next Ticket. A few reasons for not immediately closing the Ticket:
    - Additional costs for the ticket are expected, then the ticket will be closed at a later time.
    - Some Users want to view and print Service Invoices as they are created especially if paperwork needs to be attached to the Invoice.

  In this example, we will not select the Close Ticket After Invoicing checkbox, so we will need to Close the Ticket as a second step after Creating and Viewing the Invoice.

Click the Create Invoice button.

Once the Invoice has posted, on the Billing tab, the Create Invoice button will change to View Invoice. Click on the View Invoice button.

On the Taskbar of your computer the SedonaOffice icon will begin to blink with an orange background - click on the icon to view the Invoice in the main SedonaOffice application.

Viewing the Invoice in SedonaOffice

After clicking the blinking SedonaOffice icon, the Invoice form will be displayed. If you want to print the Invoice now, click on the Print Preview button on the upper toolbar of the application.
If you have permissions to edit invoices, you may make changes to any part of the invoice, then click the Save button to re-post the Invoice.

The last step is to Close the Ticket; continue on for instructions.

Close the Ticket

Within the Ticket, click on the Service Ticket button from the ribbon. At the lower right of the form, click on the Close Ticket button.

A confirmation message will be displayed - click the Yes button if you are certain you want to close the ticket.

You will be returned to the Ticket Queue to continue reviewing/invoicing other Tickets in your billing queue.