

Ticket Batch Billing

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Service and Inspection tickets which are not part of Group Tickets are now eligible to be automatically billed in bulk through batch billing.

For more information on [Group Tickets](#), click on the link.

All resolved tickets that have an amount to be billed greater than \$0.00 will be displayed in the batch billing queue.

Tickets may not be opened in the batch billing queue to view their contents.

The review process prior to billing must be accomplished within the individual Tickets.

Only one user may perform Ticket Batch Billing at any one time.

Users working outside of batch billing will be prevented from viewing any tickets in which there is a checkmark indicating that the ticket is ready to be billed.

Usergroup Permissions

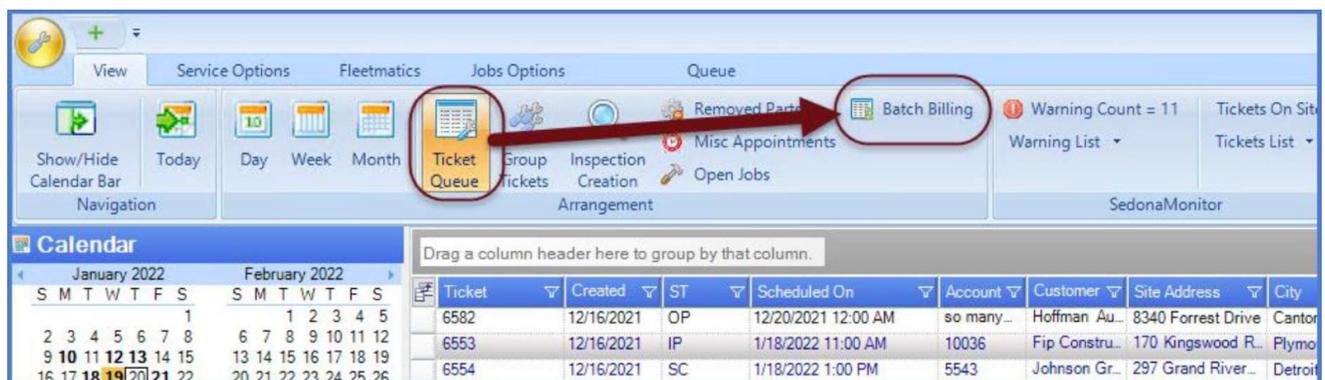
Users that will be utilizing batch billing must be given the permission "Batch Billing" in their usergroup. Refer to SedonaSetup/User Groups / Application Access-SV area, "Batch Billing".

Batch Billing Queue

While viewing the Schedule Board, click on the Batch Billing icon located in the Arrangement Ribbon group.

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While viewing a Ticket Queue, click on the Batch Billing option located in the Arrangement Ribbon group.

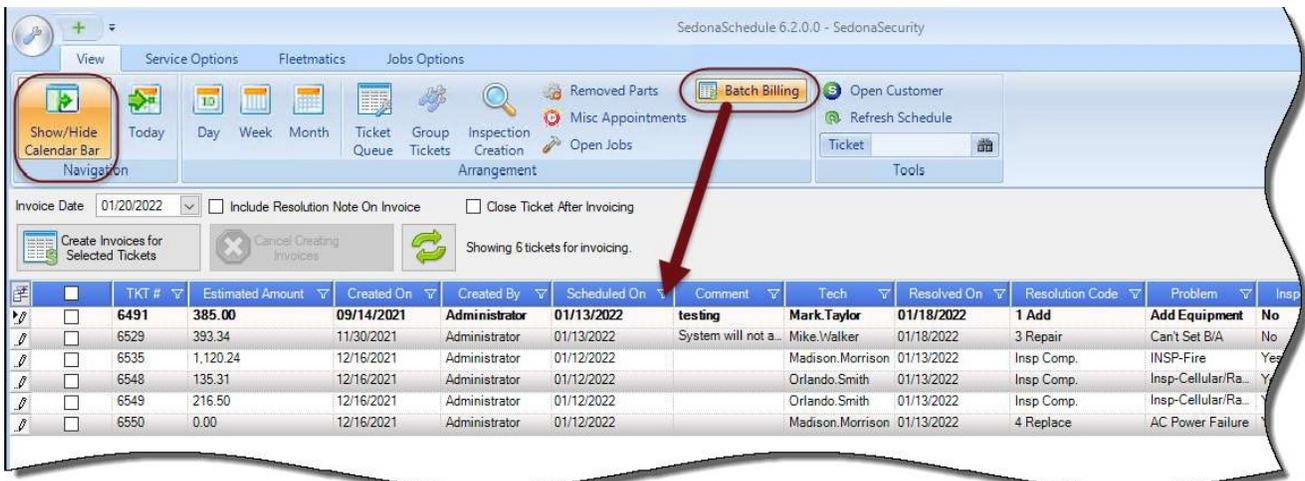


The screenshot shows the SedonaMonitor software interface. The top ribbon is labeled 'Arrangement' and contains several icons: 'Show/Hide Calendar Bar', 'Today', 'Day', 'Week', 'Month', 'Ticket Queue', 'Group Tickets', 'Inspection Creation', 'Open Jobs', 'Removed Parts', 'Misc Appointments', and 'Batch Billing'. The 'Batch Billing' icon is circled in red, and a red arrow points to it from the 'Ticket Queue' icon. Below the ribbon is a 'Calendar' section showing a grid for January and February 2022. To the right of the calendar is a table with columns: Ticket, Created, ST, Scheduled On, Account, Customer, Site Address, and City. The table contains three rows of data.

Ticket	Created	ST	Scheduled On	Account	Customer	Site Address	City
6582	12/16/2021	OP	12/20/2021 12:00 AM	so many...	Hoffman Au...	8340 Forrest Drive	Cantor
6553	12/16/2021	IP	1/18/2022 11:00 AM	10036	Fip Constru...	170 Kingswood R...	Plymo
6554	12/16/2021	SC	1/18/2022 1:00 PM	5543	Johnson Gr...	297 Grand River...	Detroit

Once you have access the Batch Billing Queue, a list of all Resolved tickets with an amount to invoice greater than \$0.00 will be listed.

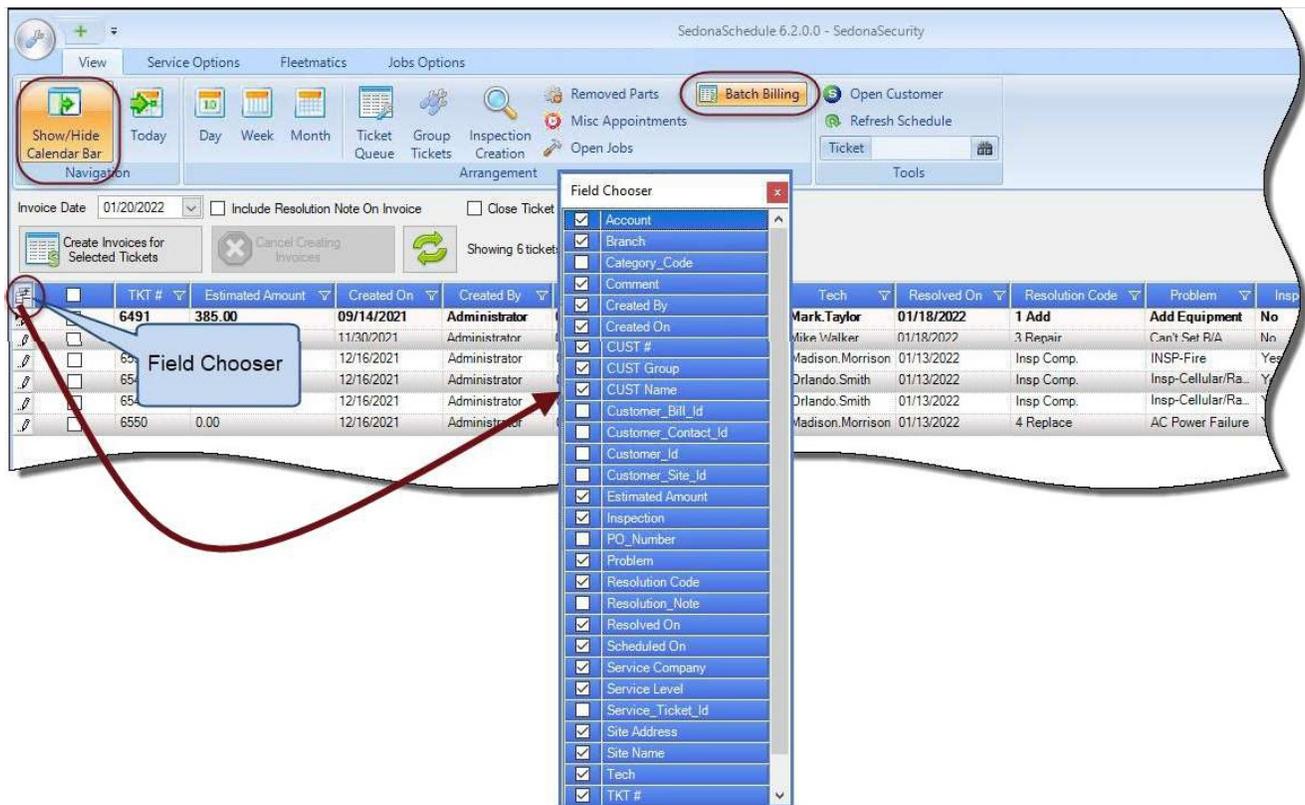
To be able to view more columns of information within the Batch Billing list, click on the Show/Hide Calendar Bar button on the Navigation ribbon.



Field Chooser

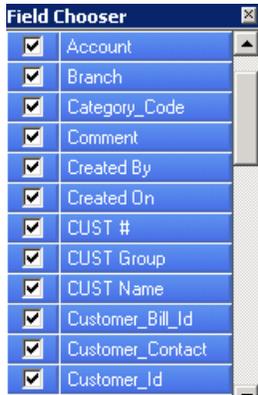
SedonaSchedule enables the user to select custom fields to be selected for viewing in batch billing. Please note that these fields are different from the ones used in the standard ticket queues. The user preferences from the service ticket queues will not automatically flow into batch billing. The user will need to define which fields are to be viewed in the batch billing queue.

To select which fields to display in the batch billing queue, click on the Field Chooser button located in the upper left hand corner of the batch billing screen.



The field chooser will be displayed. This is a listing of all of the available fields from which the user may select. All fields are checked by default. If certain fields are not needed for viewing while in batch billing, un-check the box to the left of the fields which do not need to be displayed. Use the scroll bar on the right hand side of the field chooser to view more

panes of fields. When finished, click the “x” in the upper right hand corner of the field chooser to close the window.

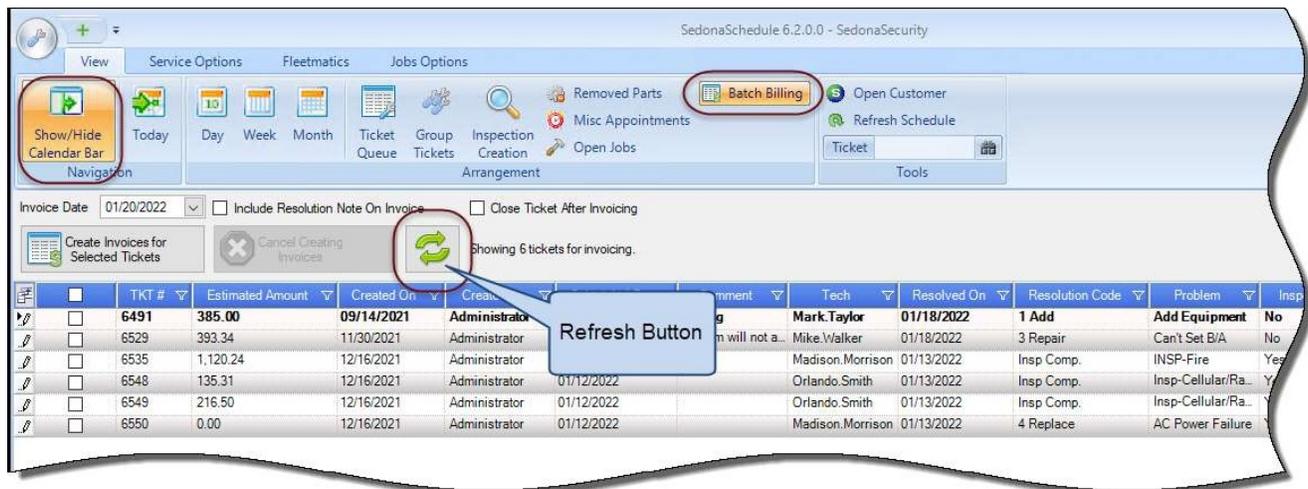


Fields may be arranged in any order desired and follow the same procedures as is currently done in the standard ticket queues. Note: At this time, field re-arrangement will not be saved as part of user preferences. The fields will remain re-arranged for the current session only.

The procedures for sorting, filtering, and grouping the items in the batch billing queues are the same as are currently in place in the standard ticket queues.

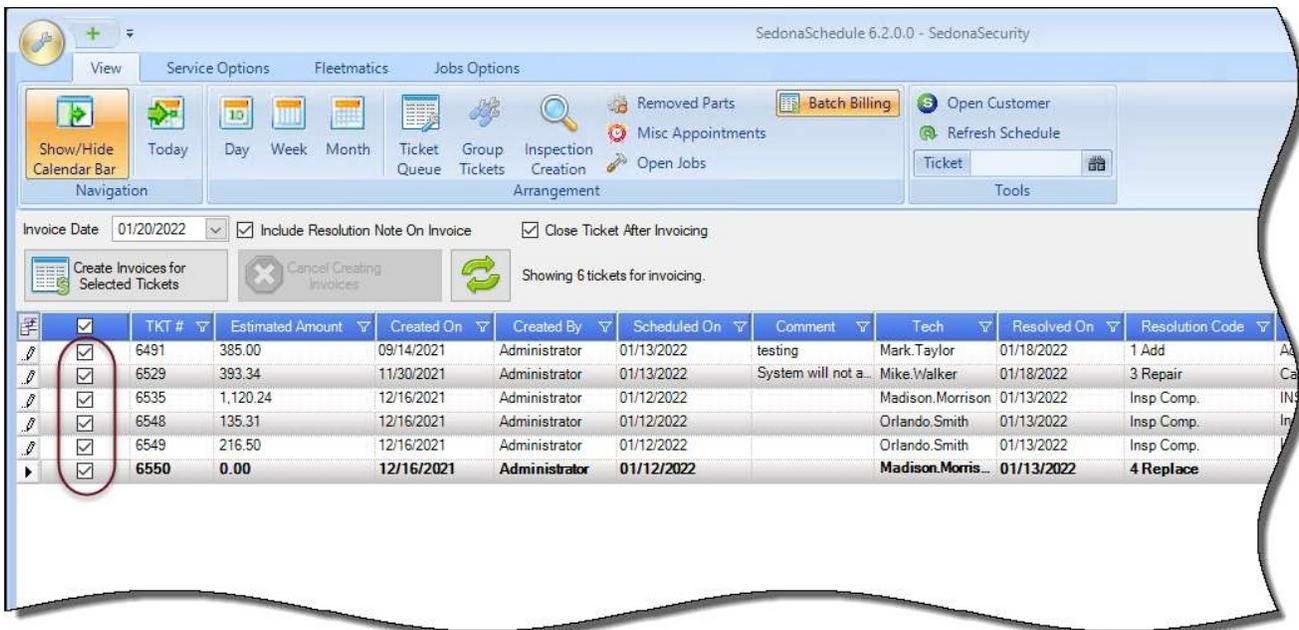
Refresh Button

A refresh button has been provided to ensure that all tickets are brought into the ticket for billing. If one has just been marked for billing, but is not appearing on the screen because batch billing is taking place, press the Refresh button to include the ticket in this set of batch bills.



Selecting Tickets To Be Billed

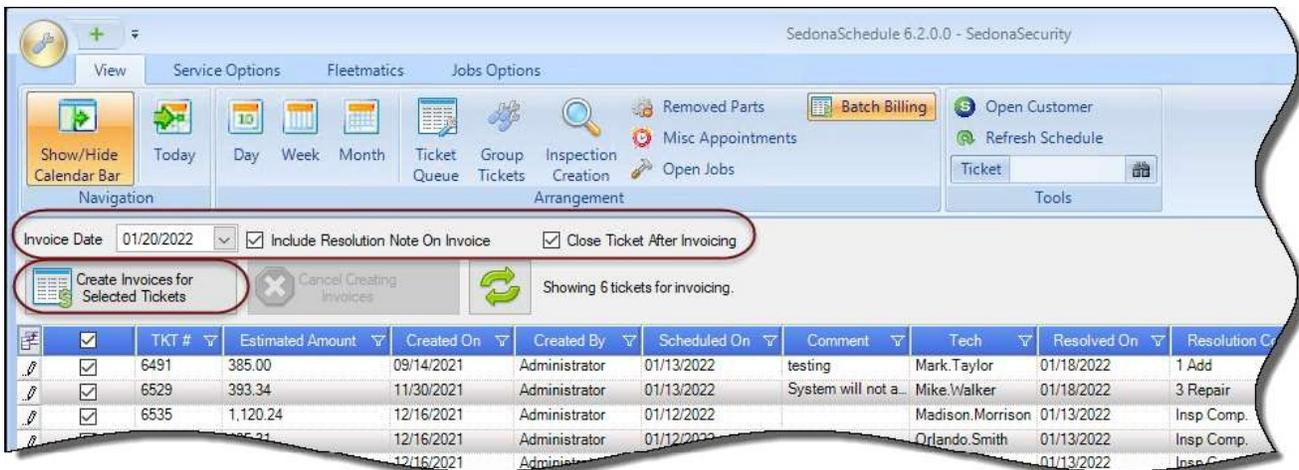
Place a checkmark next to each ticket that is ready to be billed. This will lock out the ticket from viewing by all users until billing has been completed.



Invoice Date, Resolution Notes, and Ticket Closure

The invoice date will default to today's date. If the resolution note on the ticket should be included on the memo of the invoice, please a checkmark in the box marked "Include Resolution Note On Invoice". If the ticket should be closed after billing takes place, place a checkmark in the box entitled "Close Ticket After Invoicing."

When the correct invoice selections have been made, press the button to Create Invoices For the Selected Tickets.



The system will confirm how many invoices have been marked to be created and ask:

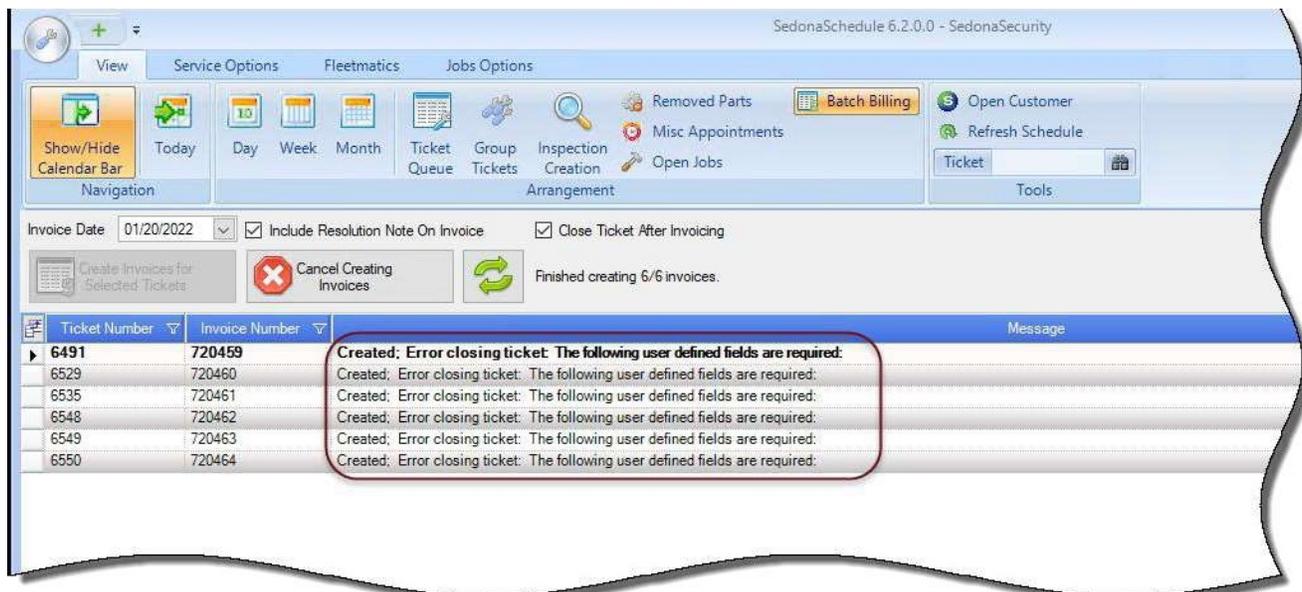


Messages

The system will record how many invoices were created as well as any problems that were encountered. This list cannot be printed. Users should use either Snipit (provided by Microsoft on every Windows installation) or use CTRL-Print Screen to record all errors encountered into a word processing document. Once the batch billing screen has been exited, it will not be possible to bring these messages back again.

In our example below, invoices were created for all six tickets, however the software could not close the tickets because a required custom field had not been populated on any of these tickets.

You will need to open each ticket, make the necessary selections on the Custom Fields form, and then manually close the ticket.



The screenshot shows the SedonaSchedule 6.2.0.0 - SedonaSecurity interface. The top menu includes View, Service Options, Fleetmatics, and Jobs Options. The main toolbar contains various icons for navigation and arrangement. Below the toolbar, there are settings for Invoice Date (01/20/2022), Include Resolution Note On Invoice, and Close Ticket After Invoicing. A status bar indicates 'Finished creating 6/6 invoices.' Below this, a table displays the results of the batch billing process:

Ticket Number	Invoice Number	Message
6491	720459	Created; Error closing ticket: The following user defined fields are required:
6529	720460	Created; Error closing ticket: The following user defined fields are required:
6535	720461	Created; Error closing ticket: The following user defined fields are required:
6548	720462	Created; Error closing ticket: The following user defined fields are required:
6549	720463	Created; Error closing ticket: The following user defined fields are required:
6550	720464	Created; Error closing ticket: The following user defined fields are required:

Print Queue

The invoices just created through Batch Billing will be visible in the Accounts Receivable / Print Invoices Queue as well as on the customer record.