

Cycle Invoicing – How to Add a Memo

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During the Cycle Invoicing Process, you have the option to add a memo that will appear on All Invoices. Depending on the Invoice Template being used will determine where the Memo will appear.

Cycle Invoicing

Open the Cycle Invoicing Process Screen

At the bottom of the page is the Memo Section. When adding a memo here, this will appear on All Cycle Invoices.

The screenshot shows the 'Cycle Invoicing Process' window. It contains several sections: 'Cycle Information' with fields for Cycle (5612), Month (July 2024), Invoice Group # (None), and Description (01-Jul-24 - Elizabeth Arrington); 'Invoice Information' with fields for Category (Admin G & A), AR Account (110110), Terms (Due On Receipt), and Invoice Date (7/1/2024); 'Aging Date' and 'ACH Hold Date' sections with checkboxes and dates; and a 'Memo' field at the bottom containing the text 'This is the Memo that can be added when creating a Cycle Billing.' The memo field is highlighted with a red rectangle.

The screenshot shows a printed invoice from Sedona Security. The header includes the company name and address. The invoice details include Customer (Amy E. Arrington), Invoice Number (49877), Invoice Date (7/1/2024), and Balance Due (\$41.50). A table of 'CURRENT CHARGES' lists items like 'Update Description' and 'FOR 124567' with amounts. Below the charges is an 'IMPORTANT MESSAGES' section with a red box containing the text 'This is the Memo that can be added when creating a Cycle Billing.' The footer includes contact information for Amy Elizabeth and Sedona Security.