

How to Change Billing from Subaccount to Billing to Master

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How to bill subaccounts is different for every customer. This document will go over how to change billing the subaccount to billing the master. Document uses examples from SedonaOffice version 6.2.0.16.

Overview

The easiest way to tell if a master account is actually being billed for all the subaccount is to click on Sub Account under Customer Information and look in the right bottom frame for the subaccount list.

Customer #	Site Name	Branch	Address	City	Master RMR	Sub RMR	Master RAR	Sub RAR
995-1	D995 - Sub1	Manitou Default	1235 Rockside Road	Garfield Heights, OH	55.50	3.00	666.00	36.00
995-2	D995 - Sub2	Manitou Default	1235 Rockside Road	Garfield Heights, OH	96.00	0.00	1152.00	0.00
995-3	D995 - Sub3	OH	1235 Rockside Road	Garfield Heights, OH	50.00	0.00	600.00	0.00
995-4	D995 - Sub4	OH	1235 Rockside Rd	Garfield Heights, OH	105.00	0.00	1260.00	0.00
Total					\$306.50	\$3.00	\$3,678.00	\$36.00

There are four columns – if amounts are in the Master RMR/RAR then that subaccount is being billed in the master account. If the amounts are in the Sub RMR/RAR then the amounts are being billed at the subaccount level.

Steps:

1. To move the RMR from the Subaccount to the Master Account – Click on the subaccount from the list – Click into the System Recurring and open the RMR.

Recurring Edit 995-1

Site and System

D995 - Sub1
1235 Rockside Road
Bldg A - 100
Garfield Heights, OH 44125

System 995-1 Fire and Burg Event Monitoring

Panel Type RAD-6412

☒ Receivable to Master

Recurring Setup | Royalties / Commissions | Escalations |

Recurring Information

Recurring Item OCRPT Show All Items Renewal

Description

Sub Item Of

Bill Cycle Monthly Rate Increase Override % 0

1. Make sure the Receivable to Master is Checked and the Bill To address displayed is the Master Address – Click Save once done.
1. If service tickets are also to be billed at the Master – then will need to right click on the site – Edit site – click on the Bill To Box – Select the Master Bill To Address

995-1 D995 - Sub1 (Sub Account of 649)

D995 - Sub1

- Customer Information
- Other Sub Accounts
- Payment Options
- Bill To
- D995 - Sub1
- Contacts
- Sites
- (995-1) D995 - Sub1
- Systems
- Contacts
- Credit Memos
- Documents

995-1 (995-1) D995 - Sub1

Customer # 995-1

Name D995 - Sub1

D995 - Sub1
1235 Rockside Road
Bldg A - 100

Balance Due:
Total Active RMR :
Total Active RAR :
Customer Type:
Customer Since:

Site Custom Fields Systems

Site Name and Address

Site Number 995-1

Bill To

Name	Address 1	City	State	Zip Code	Is Primary	Master
D995 - Sub1	1235 Rockside Road	Garfield Heights	OH	44125	Y	Sub
Dealer 995	1235 Rockside Road	Garfield Heights	OH	44125	Y	Master

(this site is using the subaccount Bill To for service invoices) – Click Save after any adjustments

1. To verify the changes, go back into the Master account - Click on the subaccounts and look at the list again to see if any were missed