

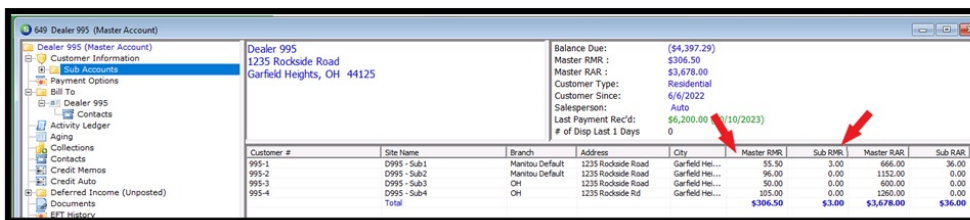
How to Change Billing from Subaccount to Billing to Master

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How to bill subaccounts is different for every customer. This document describes 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.



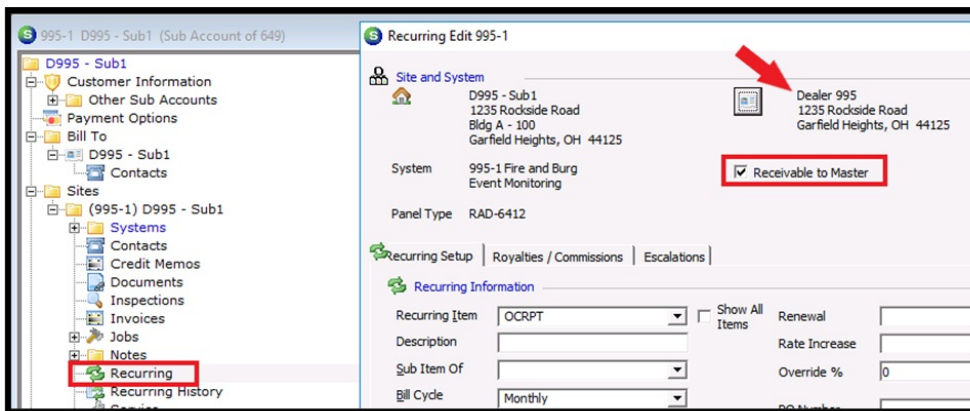
The screenshot shows the '649 Dealer 995 (Master Account)' window. The left sidebar has 'Sub Accounts' selected. The main area displays customer information for Dealer 995 at 1235 Rockside Road, Garfield Heights, OH 44125. A table at the bottom lists subaccounts with columns for Customer #, Site Name, Branch, Address, City, Master RMR, Sub RMR, Master RAR, and Sub RAR. Red arrows point to the 'Last Payment Rec'd' field and the 'Master RMR' column.

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

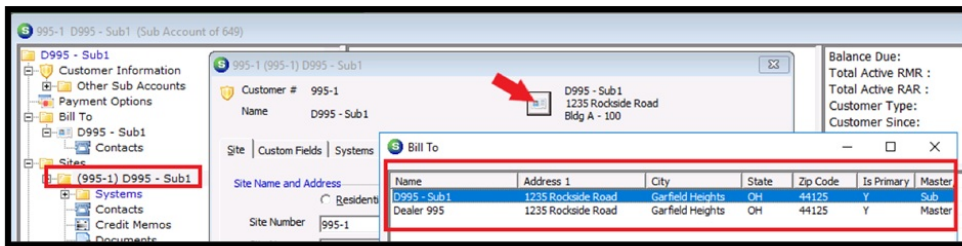
There are four columns – if amounts are in the Master RMR/RAR then that subaccount is being billed in the master account. If the amounts are in the Sub RMR/RAR then the amounts are being billed at the subaccount level.

Steps:

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



2. Make sure the Receivable to Master is Checked and the Bill To address displayed is the Master Address – Click Save once done.
3. If service tickets are also to be billed at the Master, then right click on the site; edit the site; click on the Bill To Box; and select the Master Bill To Address



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

4. 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