How to Reverse Billed-To Next Cycle Invoice from a Service Ticket

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Sometimes customers want their service invoices to be billed to them with their recurring invoices. This article will go over the steps needed to reverse that if the invoice was either accidentally selected to be billed with the cycle invoicing or customer decides they want to be billed before. The steps provided are for SedonaOffice version 6.2.0.16.
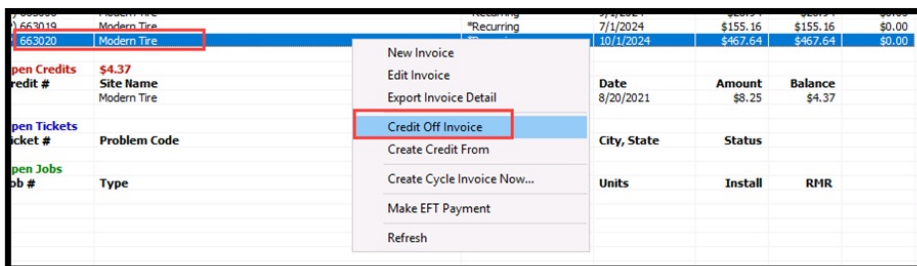
Overview

These steps assume the user will have to correct permissions to perform the actions needed. There will also be manual steps needed to change information back to the correct time frame.

- **NOTE:** *If the customer is on Autopay, may want to turn that option off until after the process is completed. Then re-enable once done.*

Steps:

1. The only way to reverse this action is by manually forcing the next RMR Cycle billing and then Post the billing, then redoing both the invoice and the RMR Next Cycle date.
    - **REFERENCE:** *How to Add an Invoice to a Customers Next Cycle Invoice from a Service Ticket*
2. After the invoice shows on the customer, may want to print invoice to see what service items were charged so can redo those charges.
3. Right click on the invoice – select Credit Off Invoice

4. Follow the steps to fully credit off the invoice.

5. Once invoice removed, Right-Click on Invoice in customer tree – Select New Invoice

6. Fill in all data needed to re-invoice the service ticket. Select Service in the Invoice Type dropdown – Select the Service Ticket Number in the Ticket # dropdown – fill in all other information about the service ticket items to be billed, can use the printout from #2 – Click Save

7. Can now send the Service Invoice to the customer after saved and verified

Now the RMR next cycle date will need to be manually fixed. If multiple RMR items were billed, then each one will need these steps separately.

1. Open the RMR Item
2. Click on Next Cycle and change the date back to the cycle date that was used in the invoice – Save

3. RMR cycle billing for the items will be back to the correct dates prior to billing.