

How to Add an Invoice to a Customer's Next Cycle Invoice from a Service Ticket

Last Modified on 09/16/2024 5:57 pm EDT

Sometimes customers want their service invoices to be billed to them with their recurring invoices. This article will go over the steps needed to add the charges from a service call to be added to that customer next cycle billing. The steps provided are for SedonaOffice version 6.2.0.16.

Overview

These steps assume the user will have the correct permissions to perform the actions needed and that the service ticket is open to the Billing Tab.

Steps:

1. In the Billing tab, for the service ticket, verify all charges and totals are being shown correctly.
2. In the Bill to Cycle area, Click on the Add to Next Cycle button

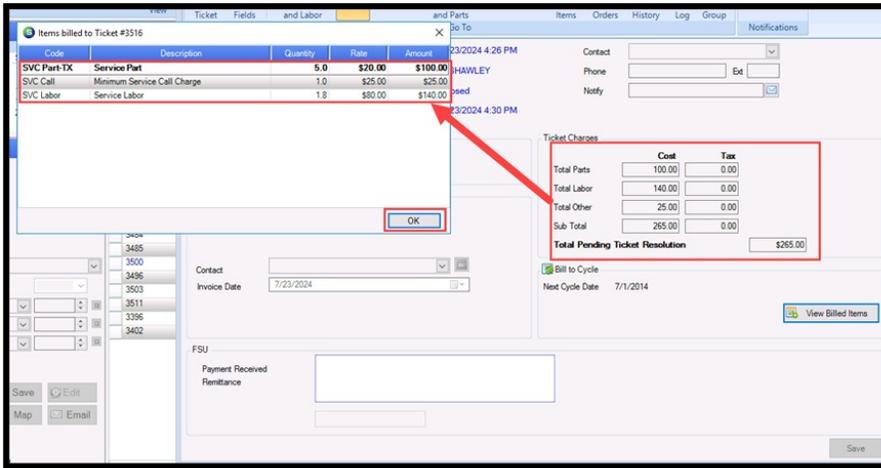
	Cost	Tax
Total Parts	100.00	7.75
Total Labor	140.00	10.85
Total Other	25.00	1.94
Sub Total	265.00	20.54
Total		\$285.54

Bill to Cycle

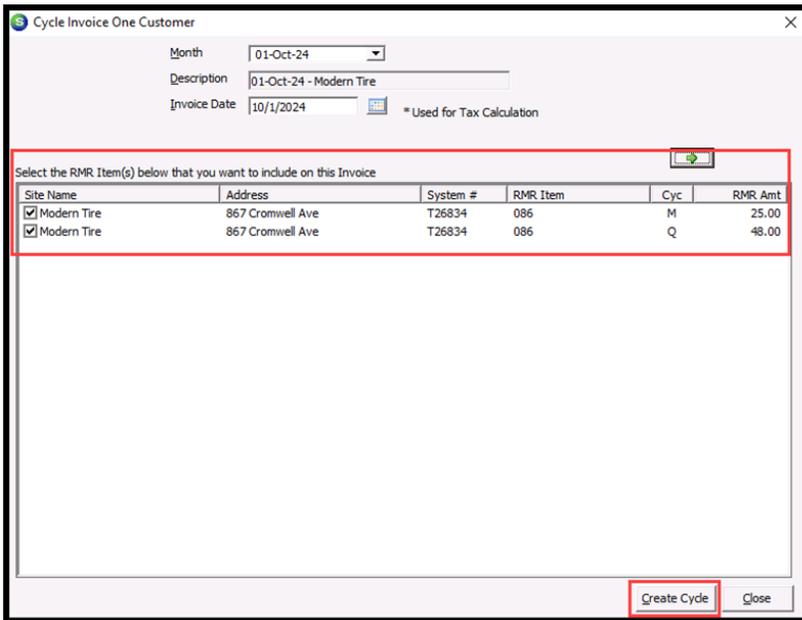
Next Cycle Date 7/1/2014

Close Ticket After Adding to Cycle

3. The Items billed to Ticket window will open to show the charges that will be added to the cycle billing. Verify totals match to what the Ticket Charges show



4. When the next cycle billing runs, these charges will show on the invoice. When running the cycle invoicing, these totals will not show as part of the cycle invoicing RMR as shown below. ONLY the RMR Items will show at this step. Click on Create Cycle Button



5. In the Cycle Invoicing Process Window, the Amount should now show the total of the RMR and the Service Ticket amount. Fill in the information needed. Can also add a memo about RMR and Service-related charges. Click Post to finish the process.

Cycle Invoicing Process

Cycle Information

Cycle: 560 Amount: 434.00
 Month: October 2024 Count: 1
 Invoice Group #: None Thru Day: 1
 Created: 7/23/2024
 Description: 01-Oct-24 - Modern Tire

Invoice Information

Category: *Monitoring
 AR Account: 110110
 Use Customer Terms:
 Term: Due On Receipt
 Invoice Date: 10/1/2024
 Invoice Description: *Recurring

Aging Date

Aging Date to Match Bill On Day:
 Aging Date: 10/1/2024

ACH Hold Date

ACH Hold Date to Match Bill On Day:
 ACH Hold to Process Date: 7/23/2024

Memo: Have to do the cycle invoice - shows amounts for both cycle and service. - must post!

Print Save **Post** Close

6. When the invoice is opened, the charges will show RMR and Service with the service amounts showing the item that is being charged and the service date and service ticket. The invoice can now be sent to the customer

Quantity		Description	Rate	Amount
<i>Modern Tire, 867 Cromwell Ave, Cleveland, OH -</i>				
1.00		Recurring Mon Services II Access Control, 10/1/2024 - 10/31/2024	25.00	25.00
1.00		Service Part Access Control, 7/23/2024 - 7/23/2024 Service Ticket#3516	100.00	100.00
1.00		Minimum Service Call Charge Access Control, 7/23/2024 - 7/23/2024 Service Ticket#3516	25.00	25.00
1.00		Service Labor Access Control, 7/23/2024 - 7/23/2024 Service Ticket#3516	140.00	140.00
3.00		Recurring Mon Services II Access Control, 10/1/2024 - 12/31/2024	48.00	144.00
		Subtotal:		\$434.00
		Tax		33.64
		Payments/Credits Applied		0.00
		Invoice Balance Due:		\$467.64



Invoice

Customer: Modern Tire
 Customer Number: 46696
 Invoice Number: 663020
 Invoice Date: 10/1/2024
 PO Number:
 PAYMENTS APPLIED THRU: 7/23/2024
 Job / Service Ticket #: