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.

In the Bill to Cycle area. Click on the Add to Next Cycle buttor						
2. THELE DIFFECTURE AFEA. CITCK OF THE AUG TO NEXT CACE DUILD	\mathbf{a}	In the Dill	to Cuclo area	Click on the	Add to Novt C	cla huttan
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Ticket Charges			
neket charges	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		Add to Next 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

	view	Ticket Fields	and Labor		and P	arts	Items Orders History Log Group	
Items billed	to Ticket #3516				×	о То	Notifications	
Code	Des	cription	Quantity	Rate	Amount 2	3/2024 4:26 PM	Contact	
SVC Part-TX	Service Part		5.0	\$20.00	\$100.00	HAWLEY	Phone Ext	
SVC Call	Minimum Service Call (Charge	1.0	\$25.00	\$25.00			
SVC Labor	Service Labor		1.8	\$80.00	\$140.00	sed	Notfy	
-						3/2024 4:30 PM		
							Table	
							Ticket Charges	
							Lost Tax	
							Total Parts 100.00 0.00	
							Total Labor 140.00 0.00	
1							Total Other 25.00 0.00	
					OK		Sub Total 265.00 0.00	
	3404						Tetal Pandan Ticket Pasch tice	
	3485							
	3500	Contact			~		Bill to Cycle	
	3503	Invoice Date	7/23/2024] -	Next Cycle Date 7/1/2014	
	3511							
	3396						Eb 1	View Billed Items
×	3402							
V (FSU						
		Deserved Deserve	3					
		Remitance	50					
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map Em								
								Save

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

Sycle Invoice One Customer					×
Month Descrip Invoice	01-Oct-24 01-Oct-24 - Modern Tire Date 10/1/2024	Used for Tax Cal	culation		
Select the RMR Item(s) below that yo	u want to include on this Invoice				
Site Name	Address	System #	RMR Item	Cyc	RMR Amt
Modern Tire	867 Cromwell Ave	T26834	086	M	25.00
Modern Tire	867 Cromwell Ave	T26834	086	Q	48.00
				<u>C</u> reate Cyde	Close

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.

•	1.4	1.42	1.0		
	Cycle I	nvoicing Process			×
1	😒 Cyd	e Information			_
		Cyde	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		
	🛐 Invo	ice Information			
		Category	"Monitoring		•
		AR Account	110110	-	1
		Use Customer Terms			
		Terms	Due On Receipt		•
		Invoice Date	10/1/2024		
		Invoice Description	"Recurring		•
	Aging	Date			
		Aging Date to Match <u>B</u> ill On Day			
		Aging Date	10/1/2024	148	
	ACH H	iold Date			
		ACH Hold Date to Match Bill On Day			
		ACH Hold to Process Date	7/23/2024	[142	
		Memo	Have to do the cycle inv service must post	oice - shows amounts for both cycle an	d
	Print			Save Post Go	se

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

		Invoice	
		Customer	Modern Tire
		Customer Number	46696
0		Invoice Number	663020
fire	solutions	Invoice Date	10/1/2024
		PO Number	
		PAYMENTS APPLIED THRU	7/23/2024
		Job / Service Ticket #	
	CURRENT	CHARGES	
Quantity	Description	Rate	Amount
Modern Tire, 867 Ci	romwell Ave, Cleveland, OH -		
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	48.00	144.00
	Notes Control, 10/1/2024 - 1231/2024	Subtotal:	\$434.00
	Тах		33.64
	Payments/Credits Applied		0.00
		Invoice Balance Due:	\$467.64