

Invoice Groups

Last Modified on 04/21/2026 2:42 pm EDT

If you need to separate some recurring lines into various groups to be invoiced at different times, you may create your own Invoice Groups. An example of using an Invoice Group would be for Customers that need to be billed in arrears.

SedonaSetup

Go to SedonaSetup - Invoice Groups.

Select New and enter the next available Number and Name for that Invoice Group. Click Apply.

Invoice Group

Invoice Groups

Number	Name	Description	Inact...
0	None		N
1	End of Month	End of Month	N
2	Cycle 15th - 14th	Group 2 - Cycle 15th - 14th	N
3	Group 3	Group 3	N
4	Group 4	Group 4	N
5	Group 5	Group 5	N
6	Group 6	Group 6	N
7	Group 7	Group 7	N
8	Group 8	Group 8	N
9	Group 9	Group 9	N
10	Group 10	Group 10	N

Include Inactive

Invoice Group Edit Inactive

Number:

Name:

Description:

Apply **New** Delete

Note: This information will not print on any Invoices.

Customer Account

Go to the Customer Account and right-click on Customer Information and select Edit Customer Setup.

Select the Invoice Group drop-down menu and select the Invoice Group needed. Save.

The screenshot shows the 'Customer Setup 50818' window. The 'Customer #' is 50818, and the customer name is Leanne Murphy. The address is 123 Knoxville Hwy, Daphne, AL 36526. The 'Setup Information' tab is active. The 'Invoice Group' dropdown menu is highlighted with a red box, showing 'End of Month' selected. The 'Save' button at the bottom right is also highlighted with a red box.

Customer #	50818	Leanne Murphy
Customer Name	Leanne Murphy	123 Knoxville Hwy
Additional Name		Daphne, AL 36526

Setup Information | Custom Fields (Customer) | Bill To | Master Account Setup | Items

Customer Status	AR	Blanket P.O.	
Customer Type	Retail	P.O. Expire Date	3/31/2026
Old Customer ID		Customer Since	3/24/2026
Terms	Due On Receipt	Chain Account	
Tax Exempt #	1	Customer Group	
EIN		Customer Group 2	
OK to Increase		Branch	Alabama
Salesperson	AEB	Invoice Group	End of Month
Registration Code	52CF60	No Collections	<input type="checkbox"/>
Master Account Information		Part Pricing Level	None
Is Master Account	<input type="checkbox"/>	Print Statements	<input checked="" type="checkbox"/>
Master Acct		Print Site Info on Invoices	<input checked="" type="checkbox"/>
		Separate Cycle Invoice for Each Site	<input checked="" type="checkbox"/>
		Charge Late Fees	<input checked="" type="checkbox"/>

Critical Message

Expires On

Save Close

By selecting the Invoice Group in the Customer Setup, when a new RMR Item is added to this Account, the Invoice Group will automatically default to that Invoice Group selected.

For an existing Customer that has active RMR but needs to be added to an Invoice Group, you will need to open each of the existing RMR Items on their Account and select the appropriate Invoice Group from the drop-down menu and Save.

Recurring Edit 50818

Site and System

Main Home
123 Knoxville Hwy
Daphne, AL 36526

Leanne Murphy
123 Knoxville Hwy
Daphne, AL 36526

System 50818-5266-1
Cell

Panel Type

Recurring Setup | Royalties / Commissions | Escalations

Recurring Information

Recurring Item Carbon Monoxide II
Description Carbon Monoxide Monitoring II
Sub Item Of
Bill Cycle Monthly

Renewal
Rate Increase
Override % 0
PO Number
PO Expires
Reference
Memo

RMR Amount \$35.00
Cycle Amount \$35.00
Next Cycle May 2026
Recurring Start 4/1/2026
Recurring End
Invoice Group End of Month

Save Close

Creating the Cycle Billing

When creating the Cycle Invoice for this specific Invoice Group go to Cycle Invoicing.

Enter the Month, the Invoice Date and then select the appropriate Invoice Group.

Select the appropriate Branch(es). Save.

New Cycle Invoicing

Cycle Bill

Month: 01-Apr-26

Invoice Date: 4/1/2026 * Used for Tax Calculation

Invoice Group #: End of Month

Description: 01-Apr-26

Include Customers with Bill Day: 28 or Less

All RMR
 Only Inspection Linked RMR
 Only Non-Inspection Linked RMR

Include	Branch	Description	Last Cycle	Posted
<input type="checkbox"/>	**MUST ASSIGN**	**MUST ASSIGN**	4/1/2026	Y
<input type="checkbox"/>	123 test	123 test	4/1/2026	Y
<input type="checkbox"/>	ADI Integration	ADI Integration	4/1/2026	Y
<input checked="" type="checkbox"/>	Alabama	Alabama	4/1/2026	Y
<input type="checkbox"/>	Americas Best	Americas Best	4/1/2026	Y
<input type="checkbox"/>	Ashlee Test	Ashlee Test	4/1/2026	Y
<input type="checkbox"/>	Boss Systems	Boss Systems	4/1/2026	Y
<input type="checkbox"/>	collection branch	collection branch	4/1/2026	Y
<input type="checkbox"/>	Cycle Billing Branch	Cycle Billing Branch	4/1/2026	Y
<input type="checkbox"/>	Dons Test Branch	Dons Test Branch	4/1/2026	Y
<input type="checkbox"/>	FL	FL Branch	4/1/2026	Y

All Branches

Save Close