

Resolutions Notes on Service Invoices in SedonaOffice

05/31/2024 9:09 am EDT

Description of Issue:

We used to see the Resolution Notes for Service Tickets on our Invoices, but we don't anymore.

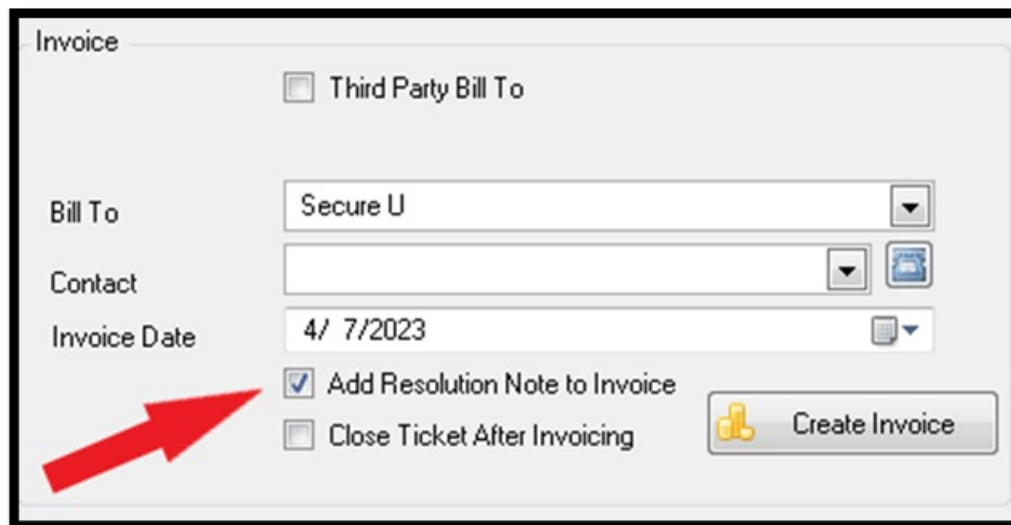
Support note: The Add Resolution Note to Invoice box is not a universal setting so each person creating invoices from Service Tickets will need to have that box marked if they want the Resolution Note on the Invoice.

Resolution:

This may be the result of either the Invoice Memo overtaking the Resolution note or the checkbox that pushes the Resolution Note to the Invoice is not marked.

To Add Resolution Note to Invoice:

Before creating the invoice from the Service Ticket, mark the Add Resolution Note to Invoice checkbox. Once marked, Create Invoice. The Resolution note will appear on the invoice.



The screenshot shows the 'Invoice' form in SedonaOffice. It includes the following elements:

- Third Party Bill To:** A checkbox that is currently unchecked.
- Bill To:** A dropdown menu with 'Secure U' selected.
- Contact:** A dropdown menu with an empty selection and a small icon to the right.
- Invoice Date:** A date field showing '4/ 7/2023' with a calendar icon to the right.
- Add Resolution Note to Invoice:** A checkbox that is checked. A red arrow points to this checkbox.
- Close Ticket After Invoicing:** A checkbox that is currently unchecked.
- Create Invoice:** A button with a yellow pushpin icon.

Support note: If the invoice has already been created, this box will no longer be available, and the Resolution Note will not be added to the invoice.

If the box was not marked when the invoice was created but you need the Resolution Note, then you can instead use a field in Printing Preferences to display the Resolution Note anyway.

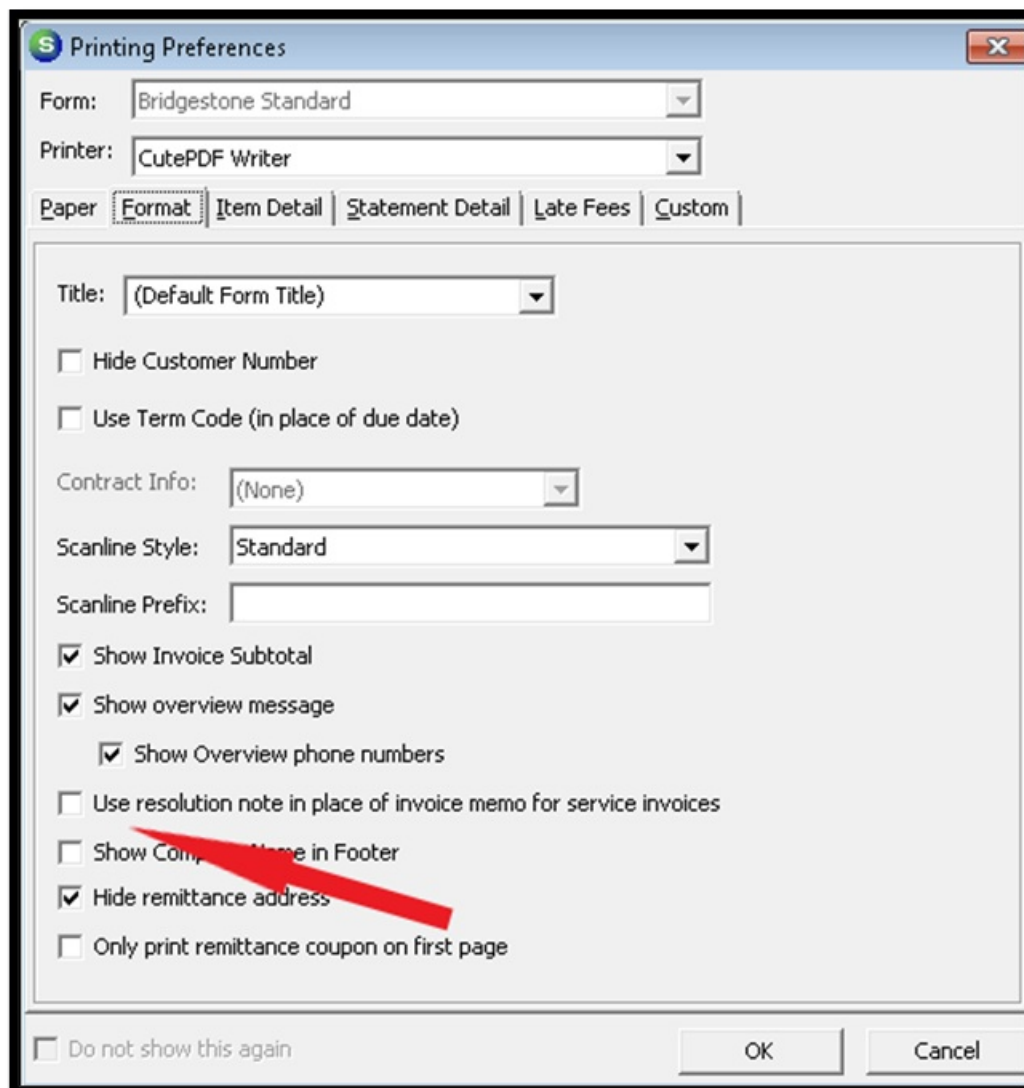
Or, if you are only seeing the Invoice Memo on the invoice, you can do this as well.

Open the Invoice and Go to Print Preview
Go to the Format tab.

Mark the Use Resolution Note in place of invoice memo for service invoices box.

Click Ok.

You should see the resolution note on the invoice now.



The image shows a 'Printing Preferences' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog is divided into several sections. At the top, there are two dropdown menus: 'Form:' set to 'Bridgestone Standard' and 'Printer:' set to 'CutePDF Writer'. Below these is a tabbed interface with five tabs: 'Paper', 'Format', 'Item Detail', 'Statement Detail', and 'Late Fees'. The 'Format' tab is currently selected. Inside the 'Format' tab, there is a 'Title:' dropdown menu set to '(Default Form Title)'. Below this are two unchecked checkboxes: 'Hide Customer Number' and 'Use Term Code (in place of due date)'. Next is a 'Contract Info:' dropdown menu set to '(None)'. Below that is a 'Scanline Style:' dropdown menu set to 'Standard', followed by an empty 'Scanline Prefix:' text field. There are three checked checkboxes: 'Show Invoice Subtotal', 'Show overview message', and 'Show Overview phone numbers'. Below these are three unchecked checkboxes: 'Use resolution note in place of invoice memo for service invoices', 'Show Company Name in Footer', and 'Hide remittance address'. At the bottom of the main area is one more unchecked checkbox: 'Only print remittance coupon on first page'. At the very bottom of the dialog, there is a checkbox labeled 'Do not show this again' on the left, and 'OK' and 'Cancel' buttons on the right. A red arrow points from the left towards the 'Show Company Name in Footer' checkbox.

Form: Bridgestone Standard

Printer: CutePDF Writer

Paper **Format** Item Detail Statement Detail Late Fees Custom

Title: (Default Form Title)

☐ Hide Customer Number

☐ Use Term Code (in place of due date)

Contract Info: (None)

Scanline Style: Standard

Scanline Prefix:

☒ Show Invoice Subtotal

☒ Show overview message

☒ Show Overview phone numbers

☐ Use resolution note in place of invoice memo for service invoices

☐ Show Company Name in Footer

☒ Hide remittance address

☐ Only print remittance coupon on first page

☐ Do not show this again

OK Cancel