

Adding Service Charges to Cycle Invoices in SedonaOffice

12/28/2023 2:43 pm EST

How to Enable “Bill to Cycle” for Service Tickets

When invoicing a Service Ticket there is an option to include the Service Ticket charges on the customer’s next cycle invoice, rather than create a separate service ticket invoice. This is a permission-based feature.

**** IMPORTANT NOTE:** Once the “Add to Next Cycle” has been selected, it Cannot be Reversed. ******

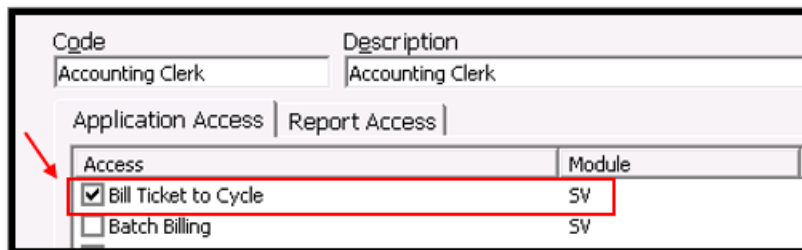
Sedona Setup

Go to Sedona Setup

Go to User Groups and select the correct User Group

Scroll down to the Service Module Permissions (SV)

Select “Bill To Cycle” and Apply.



Service Ticket

Open the Service Ticket to Invoice

Select the Billing Tab

On the bottom right side is the “Bill to Cycle” section

If the Customer has active RMR the Next Cycle Date will be shown.

If the Customer does not have active RMR the option to Bill To Cycle will not be available.

Click the “Add to Next Cycle” button.

Ticket #9764

Ticket Central Station

Service Ticket Custom Appointment and Labor **Billing** Documents (0) Equipment and Parts Journal Notes (1) Other Items Purchase Orders (0) Service History Ticket Log Ticket Group Critical Messages (1) Over 60 Notifications

Customer 48977 Elizabeth Arrington Site Elizabeth Arrington 2345 Sunny Lane Daphne, AL 36526 Central Time Created 1/31/2023 12:00 PM Created By Administrator Status Resolved Resolved 5/18/2023 7:44 AM Contact Phone Notify

Billing Overrides ☒ Override Warranty ☒ Override Service Level

Invoice ☐ Third Party Bill To Contact Invoice Date 5/18/2023 ☒ Add Resolution Note to Invoice ☒ Close Ticket After Invoicing Create Invoice

Ticket Charges

	Cost	Tax
Total Parts	0.00	0.00
Total Labor	0.00	0.00
Total Other	2.00	0.10
Sub Total	2.00	0.10
Total		\$2.10

☒ Bill to Cycle Next Cycle Date 3/1/2023 ☒ Close Ticket After Adding to Cycle Add to Next Cycle

FSU Payment Received N Remittance N

Save

The Service Ticket will automatically close if you selected the option to "Close Ticket After Adding to Cycle" or you can close the ticket manually.

Cycle Invoice

Once the Customer's next cycle Invoice is created, the Service Ticket will be listed after the RMR Items.

Sedona Security
1234 Alarm Ave.
Nowhere, USA 56789

Invoice

Customer Elizabeth Arrington
Customer Number 48977
Invoice Number 469034
Invoice Date 3/1/2023
PO Number
PAYMENTS APPLIED THRU 5/18/2023
Job / Service Ticket #

CURRENT CHARGES

Quantity	Description	Rate	Amount
<i>Elizabeth Arrington, 2345 Sunny Lane, Daphne, AL</i>			
1.00	Burg Monitoring	25.00	25.00
1.00	Burg Monitoring	25.00	25.00
→ 1.00	Service Labor Service Ticket#9764	2.00	2.00
Subtotal:			\$52.00
PST			2.60
GST (596)			0.00
Payments/Credits Applied			0.00
Invoice Balance Due			\$54.60

IMPORTANT MESSAGES