

# Resolution Notes on Service Ticket Invoices in SedonaOffice

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## Resolution Notes on Service Ticket Invoices in SedonaOffice

Users have two ways to print the service ticket resolution note on service ticket invoices in SedonaOffice.

### **Add the resolution note to the Invoice Memo field.**

There is a checkbox just above the 'Create Invoice' button on service tickets labeled 'Add Resolution Note to Invoice'. If this box is checked when the invoice is made, the system will copy the resolution note from the ticket, and add it to the invoice memo field.

When using this option, if you pull up the invoice on your screen, the resolution note will show in the memo field. This checkbox will default as checked or unchecked on a user by user basis, based on the user's last selection.

Note that the memo field on invoices allows for 255 characters, so if the resolution note is longer than that, the system will only add the first 255 characters to the invoice memo.

Ticket #9795

Ticket Central Station

Service Ticket Custom Fields Appointments and Labor **Billing** Documents (0) Equipment and Parts Journal No

Go To

Customer 2063  
Carey, Clay

Site Clay Carey  
72 Bond Street  
Novi, MI 48375  
Eastern Time

Created 2/15/2023 11:17 AM

Created By Administrator

Status Resolved

Resolved 5/5/2023 2:34 PM

Billing Overrides

Override Warranty

Override Service Level

Invoice

Third Party Bill To

Contact

Invoice Date 5/ 5/2023

Add Resolution Note to Invoice

Close Ticket After Invoicing

Create Invoice

Ticket

Tot

Tot

Tot

Sub

To

Bill

Next C

## Replace the Invoice Memo field with the resolution note.

There is a checkbox in the invoice Printing Preferences window labeled 'Use resolution note in place of invoice memo for service invoices'. When this option is checked the system will ignore the invoice memo, and print the associated service ticket resolution note instead.

When using this option, if you pull up the invoice on your screen, the resolution note will not show in the invoice memo field. It will only show on the invoice when you print it.

This checkbox will default as checked or unchecked on a user by user basis, based on the user's last selection.

Note that because the system is not using the invoice memo field, the full resolution note will print on the invoice, even if it exceeds 255 characters.

**S Printing Preferences**

Form: Standard Form

Printer: CutePDF Writer

Paper | **Format** | Item Detail | Late Fees

Title: (Default Form Title)

Hide Customer Number

Use Term Code (in place of due date)

Contract Info: (None)

Scanline Style: (None)

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