

Service Ticket Billing Options in SedonaOffice

12/28/2023 3:02 pm EST

There are four ways to bill service tickets. Traditionally you can simply navigate to the ticket's billing tab, select the correct bill to on the customer's account, and click Create Invoice. But you can also bill using Third Party Billing, Add to Next Cycle, and Batch Billing.

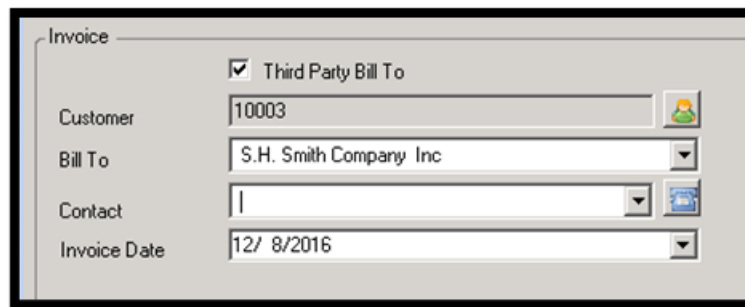
Create Invoice

To bill a ticket the traditional way, add all charges to the ticket, resolve the ticket, then navigate to the billing tab and select the Create Invoice option.

Third-Party Billing

This is for use when the service ticket is on one customer's account and the invoice needs to go to a different account. In this case, you can check the Third Party Bill To box on the billing tab, search for the other customer, and then create the invoice.

- Note: this is not the same as billing sub-accounts to master accounts. If a subaccount is set up to bill service ticket invoices to the master it will do so automatically. There is no need to select third-party billing.



The screenshot shows a software window titled "Invoice". At the top, there is a checkbox labeled "Third Party Bill To" which is checked. Below this, there are four input fields: "Customer" with the value "10003", "Bill To" with the value "S.H. Smith Company Inc", "Contact" with a single character, and "Invoice Date" with the value "12/ 8/2016". Each field has a small icon to its right, likely for searching or refreshing the data.

Bill to Next Cycle

If the customer has recurring on their account you may choose not to create a service ticket invoice, and instead apply the charges from the ticket to the next recurring cycle invoice. If this option is selected all of the charges from the ticket will appear on that customer's next recurring invoice.

Billing Overrides

☐ Override Warranty

☐ Override Service Level

Invoice

☐ Third Party Bill To

Contact: [Dropdown]

Invoice Date: 12/ 8/2016

☒ Add Resolution Note to Invoice

☒ Close Ticket After Invoicing

 Create Invoice

Ticket Charges

	Cost	Tax
Total Parts	100.93	7.32
Total Labor	0.00	0.00
Total Other	115.00	9.49
Sub Total	215.93	16.81
Total		\$232.74

 **Bill to Cycle**

Next Cycle Date: 12/1/2016

☐ Close Ticket After Adding to Cycle

 Add to Next Cycle

Invoice

Customer ID: 11630 Category: [Dropdown] A/R Account: 110110 Tag Group: RI-Wayne County

Invoice # 392037 12/8/2016 - 12/8/2016

McDowell, Anne
720 Wolcott Street
Novi, MI 48375

Site Address: Anne McDowell
720 Wolcott Street
Novi, MI 48375

Invoice Date: 12/1/2016 Aging Date: 12/1/2016

Branch: MI P.O. Number: [Dropdown]

Warehouse: [Dropdown] Term: Due On Receipt

Invoice Type: Cycle Bill

Salesperson: N/A

Items \$235.93

Item	Site	Months	Rate	Amount	Memo
096	Recurring Mon Services II	1	20.00	20.00	
PST Battery	Batteries - Taxable	1	100.93	100.93	Service Ticket #4134
SVC Call	Minimum Service Call Charge	1	115.00	115.00	Service Ticket #4134

Description: Recurring

Contact: [Dropdown]

Memo: [Text Area]

Sub Total: 235.93
Tax: 17.21
Total: 253.14
Balance Due: 253.14

☒ Complete
☒ Add to Print Queue

Invoice List DFT Save Close

Batch Billing

The Batch Billing feature can be used on inspection and service tickets to bill multiple service tickets at one time. Batch billing cannot be used for group tickets. Before beginning batch billing make sure all tickets have been reviewed and payment method has been selected on the ticket if applicable. To begin:

1. Access Batch Billing by going to Service – View tab – Batch Billing.
2. At the top select what the invoice date should be for all invoices, whether or not the resolution note should be added to the invoice memo field, and whether the ticket should be auto-closed when invoicing is done.
3. Check the box for each ticket you want to create an invoice for and click the Create Invoices for Select Tickets button

4. The system will pop up and ask you to verify you are ready to create the invoices. Select Okay and invoices for each ticket will be generated. The generated invoices can be accessed the same and appear the same as invoices created manually on each ticket.

The screenshot shows the SageQuest software interface. The top menu bar includes 'View', 'Service Options', 'SageQuest', and 'Jobs Options'. Below the menu bar are several toolbars: 'Navigation' (Show/Hide Calendar Bar, Today), 'Arrangement' (Day, Week, Month, Ticket Queue, Group Tickets, Inspection Creation, Open Jobs), and 'Tools' (Batch Billing, Open Customer, Refresh Schedule, Ticket 4130). The main area is divided into two sections. On the left is a 'Calendar' showing December 2016 and January 2017. On the right is a 'Create Invoices for Selected Tickets' window. This window has a header with 'Invoice Date' set to 12/21/2016, and checkboxes for 'Include Resolution Note On Invoice' and 'Close Ticket After Invoicing'. Below the header are three buttons: 'Create Invoices for Selected Tickets', 'Cancel Creating Invoices', and a refresh button. A status bar indicates 'Showing 7 tickets for invoicing.' Below this is a table with the following columns: 'TKT #', 'Created On', 'Created By', 'Scheduled On', and 'Comment'. The table contains the following data:

TKT #	Created On	Created By	Scheduled On	Comment
3985	08/02/2016	JesslynnL	12/30/1899	
4097	10/31/2016	Administrator	12/01/2016	
4127	12/05/2016	Administrator	12/05/2016	This is my probl.
4135	12/12/2016	Administrator	12/30/1899	
4137	12/19/2016	Administrator	12/30/1899	
4139	12/20/2016	Administrator	12/20/2016	
4140	12/20/2016	Administrator	12/20/2016	

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Ticket Number	Invoice Number	Created
3985	392058	Created
4127	392059	Created
4135	392060	Created
4137	392061	Created
4139	392062	Created
4140	392063	Created