

How to Add Invoice Groups

02/09/2024 4:41 pm EST

This article will go over how to add invoice groups to customer RMR.

Overview

Invoice Group# – The Invoice Group Number will default to 0 or none, when the recurring line is saved. If you need to separate some recurring lines into various groups to be invoiced at different times, you may create your own groups numbered from 1 to 9. An example of a time when you may need a group; some customers may only be billed in arrears; creating a group for arrears billed customers is very common.



Steps to add Invoice Group Numbers

You can add Invoice Group Numbers for RMR by following steps below:

1. In SedonaOffice, click on SedonaSetup – Invoice Groups

2. Click on New and add a number 1 – 9 that is not being used



3. Fill in Number – Name – Description



4. Click Apply to add the new Invoice Group



5. The new group is saved and available to be used to group the RMR to run together.

6. Go into the Customer Account – Site – System – Recurring – Right Click Edit – In the Recurring Setup Tab – Invoice Group# Dropdown – Select the new Group



Note that the groups can only be edited by users in version 6 and higher of SedonaOffice.