

How to Show Site Information of the Subaccounts on One Invoice

09/13/2024 4:59 pm EDT

There are times when Master accounts need one invoice with all the subaccounts showing the site addresses. This document will show how to achieve that result. The version of SedonaOffice used is 6.2.0.16.

Overview

The steps below will be done prior to running any Master Account billing. These steps should be done on each Subaccount that is to show the site information of that account.

Steps:

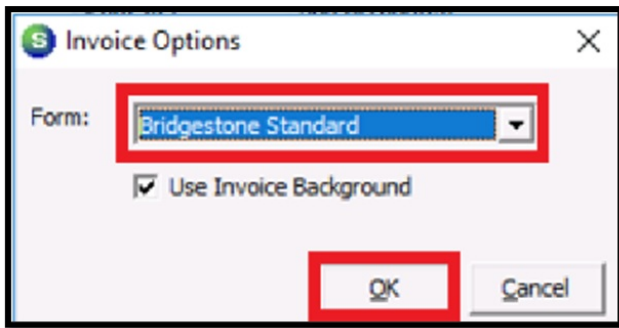
1. Open the Subaccount – Right click on the site – Click on Edit – Click on Setup Tab – Click/Verify the “Print Site Info on Invoices” option is marked – Verify Separate Cycle Invoice for Each Site is **NOT** checked – Save any changes

The screenshot shows the 'Customer Setup 649' window. The 'Master Account Information' tab is active. Under the 'Invoice Printing' section, the following options are visible:

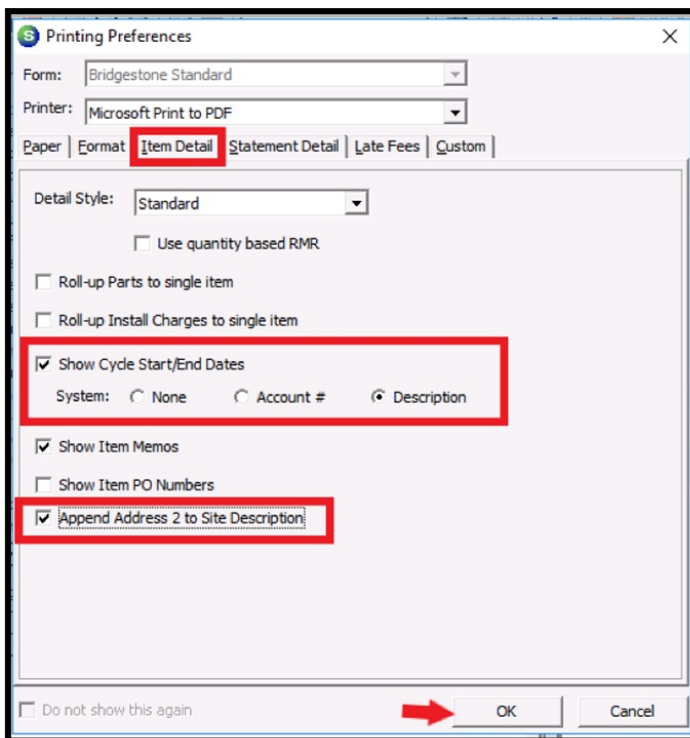
- ☒ Print Statements
- ☒ Print Site Info on Invoices
- ☐ Separate Cycle Invoice for Each Site
- ☒ Charge Late Fees

A red box highlights these options, and a red arrow points to the 'Print Site Info on Invoices' checkbox.

2. After the Master Cycle Billing is ran – Double click on the invoice – Select Form Bridgestone Standard (Master Invoice will not let you change how displayed) – Click Ok button



3. Click on Item Detail Tab – Make sure Show Cycle Description and Append Address 2 to Site Description is marked



4. Add any other details from the other tabs that is needed and click on OK
5. When the Invoice opens it will show each subaccount that is billing to the master account broke out into each subaccount, site, RMR and cycle period

**Invoice/Statement**

Customer Dealer 995
Customer Number 649
Invoice Number 662906
Invoice Date 2/1/2024
PO Number
PAYMENTS APPLIED THRU 1/31/2024
Job / Service Ticket #

CURRENT CHARGES

Quantity	Description	Rate	Amount
<i>D995 - Sub1, 1235 Rockside Road, Garfield Heights, OH - Bldg A - 100</i>			
1.33	Open/Close Reports	4.00	5.33
	Event Monitoring, 12/1/2023 - 1/10/2024		
3.00	Open/Close Reports	2.00	6.00
	Event Monitoring, 12/1/2023 - 2/29/2024		
1.00	Recurring Mon Services II	48.00	48.00
	Event Monitoring, 2/1/2024 - 2/29/2024		
1.00	Open/Close Reports	2.00	2.00
	Event Monitoring, 2/1/2024 - 2/29/2024		
<i>D995 - Sub2, 1235 Rockside Road, Garfield Heights, OH - Bldg A - 200</i>			
1.00	Recurring Mon Services II	48.00	48.00
	Event Monitoring, 2/1/2024 - 2/29/2024		
<i>D995 - Sub3, 1235 Rockside Road, Garfield Heights, OH - BLDG 506</i>			
1.00	Monitoring Services	50.00	50.00
	Fire System, 2/1/2024 - 2/29/2024		
Subtotal:			\$159.33
Tax			3.88
Payments/Credits Applied			0.00
Invoice Balance Due:			\$163.21

IMPORTANT MESSAGES