

How To Prevent Duplicate System Account Numbers

07/05/2024 12:03 pm EDT

SedonaSetup – AR Setup Processing

In the AR Setup Processing under the Numbering Section there is an option – Require Unique System Account Company Wide.

When this option is selected if a System Account Number is entered but already exists in Sedona, the Account Number will not be saved.

The screenshot shows the 'Sedona Office Setup (Sedona Security)' window. The left sidebar lists various setup areas, with 'Setup Processing' selected under the 'AR' category. The main window displays the 'Setup Processing' configuration page, which is divided into three sections: 'Numbering', 'Invoicing and Credits', and 'Other'.

Numbering Section:

- Auto Invoice:** ☒ (checked)
- Next Invoice:** 497841
- Auto Customer:** ☒ (checked)
- Next Customer:** 50240
- Auto Job Number:** ☒ (checked)
- Next Job Number:** 4264
- Require System Account:** ☐ (unchecked)
- Require Unique System Account Company Wide:** ☐ (unchecked) - This option is highlighted with a red box.

Invoicing and Credits Section:

- Cycle Beginning Day:** ☒ First Day of Month, ☐ Day of Service Start
- EFT Returned Payment Invoice:** Item: EFT ACH Return, Description: NSF Returned Item
- Print Customer Number on Invoices and Statements:** ☒ (checked)
- Allow Printed Invoices to be Edited:** ☒ (checked)
- Enter Separate Posting Date for Invoices and Credits:** ☒ (checked)
- Allow direct invoicing to Master Account:** ☒ (checked)
- Use Credit Request Processing:** ☐ (unchecked)
- Require Credit Reason on Credit Memos:** ☒ (checked)
- Include Registration Code:** ☒ (checked)

Other Section:

- GL Categories required for Income and Expenses:** ☒ (checked)
- Activate Customer Group Security by User:** ☐ (unchecked)
- Customer Group:** 02
- Enable Activity Tracking:** ☒ (checked)
- Screen Employees by Type:** ☒ (checked)
- Allow Site Only RMR:** ☐ (unchecked)
- Allow Quantity Based RMR:** ☐ (unchecked)
- Group Deferred Revenue By:** ☐ GL Account, ☒ Item Type
- Require Tape Totals to Match Deposit Amount in order to Make Deposit:** ☒ (checked)

An 'Apply' button is located at the bottom right of the window.