How to Add an Invoice to a Customer's Next Cycle Invoice from a Service Ticket

09/16/2024 5:57 pm EDT

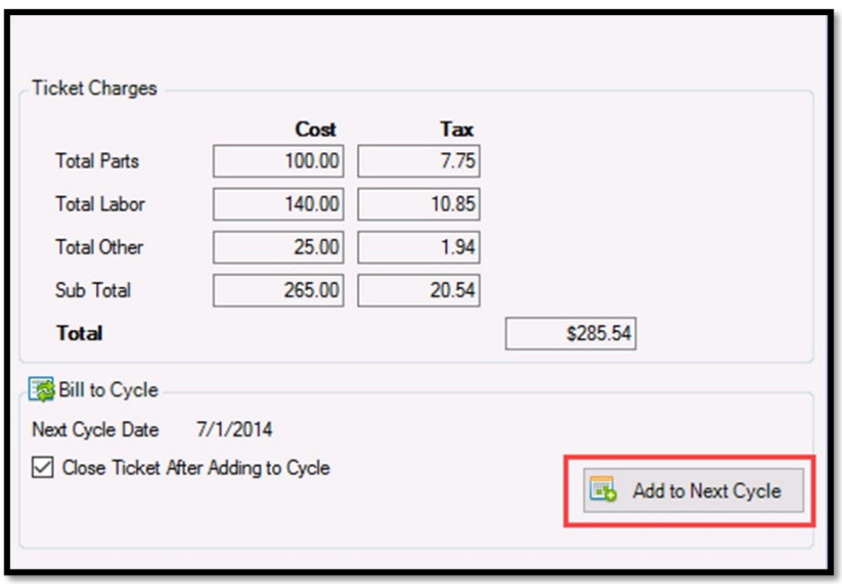
Sometimes customers want their service invoices to be billed to them with their recurring invoices. This article will go over the steps needed to add the charges from a service call to be added to that customer next cycle billing. The steps provided are for SedonaOffice version 6.2.0.16.

Overview

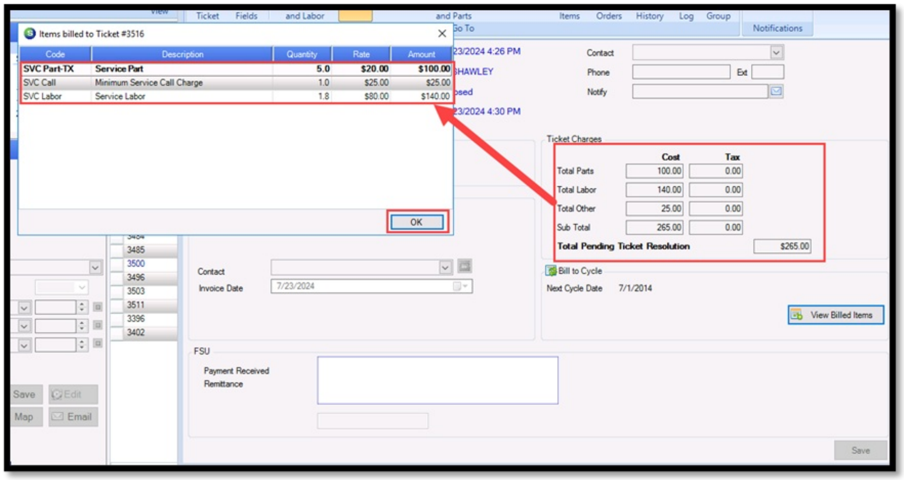
These steps assume the user will have the correct permissions to perform the actions needed and that the service ticket is open to the Billing Tab.

Steps:

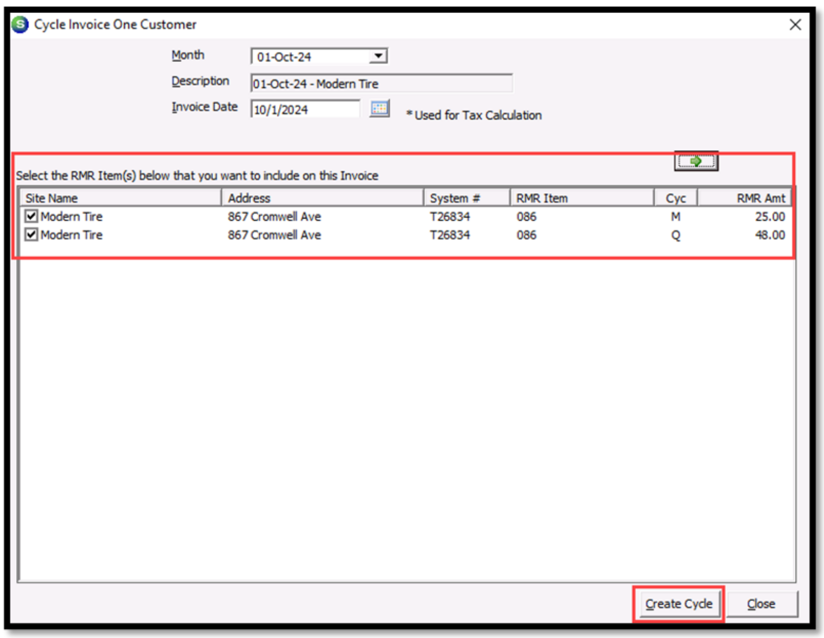
1. In the Billing tab, for the service ticket, verify all charges and totals are being shown correctly.
2. In the Bill to Cycle area, Click on the Add to Next Cycle button



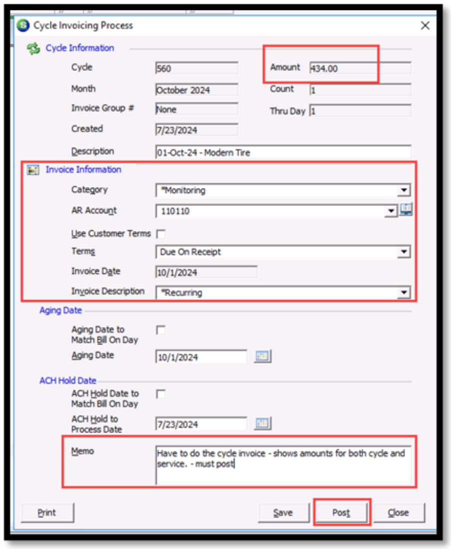
3. The Items billed to Ticket window will open to show the charges that will be added to the cycle billing. Verify totals match to what the Ticket Charges show



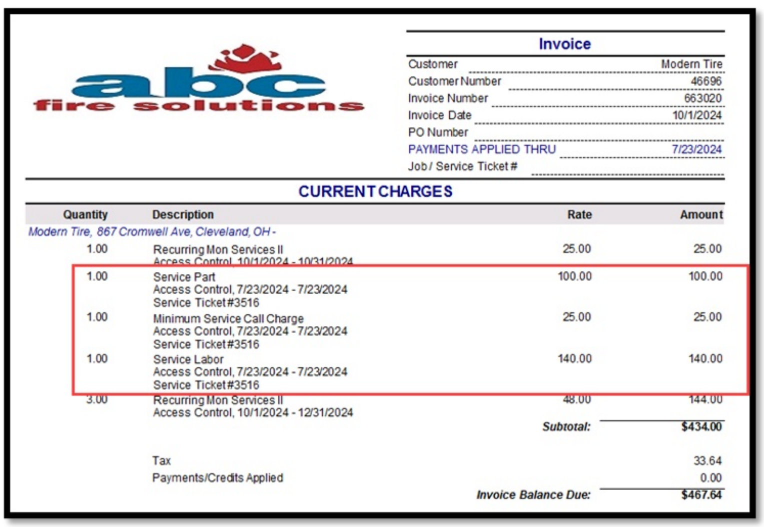
4. When the next cycle billing runs, these charges will show on the invoice. When running the cycle invoicing, these totals will not show as part of the cycle invoicing RMR as shown below. ONLY the RMR Items will show at this step. Click on Create Cycle Button



5. In the Cycle Invoicing Process Window, the Amount should now show the total of the RMR and the Service Ticket amount. Fill in the information needed. Can also add a memo about RMR and Service-related charges. Click Post to finish the process.



6. When the invoice is opened, the charges will show RMR and Service with the service amounts showing the item that is being charged and the service date and service ticket. The invoice can now be sent to the customer



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Invoice

Customer	Modern Tire
Customer Number	46696
Invoice Number	663020
Invoice Date	10/1/2024
PO Number	
PAYMENTS APPLIED THRU	7/23/2024
Job / Service Ticket #	

CURRENT CHARGES

Quantity	Description	Rate	Amount
	Modern Tire, 867 Cromwell Ave, Cleveland, OH -		
1.00	Recurring Mon Services II Access Control, 10/1/2024 - 10/31/2024	25.00	25.00
1.00	Service Part Access Control, 7/23/2024 - 7/23/2024 Service Ticket #3516	100.00	100.00
1.00	Minimum Service Call Charge Access Control, 7/23/2024 - 7/23/2024 Service Ticket #3516	25.00	25.00
1.00	Service Labor Access Control, 7/23/2024 - 7/23/2024 Service Ticket #3516	140.00	140.00
3.00	Recurring Mon Services II Access Control, 10/1/2024 - 12/31/2024	48.00	144.00
		Subtotal:	$434.00
	Tax		33.64
	Payments/Credits Applied		0.00
		Invoice Balance Due:	$467.64