

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

	Cost	Tax
Total Parts	100.00	7.75
Total Labor	140.00	10.85
Total Other	25.00	1.94
Sub Total	265.00	20.54
Total		\$285.54

Bill to Cycle

Next Cycle Date 7/1/2014

☒ Close Ticket After Adding to Cycle

Add to Next Cycle

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

Items billed to Ticket #3516

Code	Description	Quantity	Rate	Amount
SVC Part-TX	Service Part	5.0	\$20.00	\$100.00
SVC Call	Minimum Service Call Charge	1.0	\$25.00	\$25.00
SVC Labor	Service Labor	1.8	\$80.00	\$140.00

23/2024 4:26 PM

23/2024 4:30 PM

OK

Ticket Charges

	Cost	Tax
Total Parts	100.00	0.00
Total Labor	140.00	0.00
Total Other	25.00	0.00
Sub Total	265.00	0.00
Total Pending Ticket Resolution		\$265.00

Bill to Cycle

Next Cycle Date: 7/1/2014

View Billed Items

Save

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

Cycle Invoice One Customer

Month: 01-Oct-24

Description: 01-Oct-24 - Modern Tire

Invoice Date: 10/1/2024 * Used for Tax Calculation

Select the RMR Item(s) below that you want to include on this Invoice

Site Name	Address	System #	RMR Item	Cyc	RMR Amt
☒ Modern Tire	867 Cromwell Ave	T26834	086	M	25.00
☒ Modern Tire	867 Cromwell Ave	T26834	086	Q	48.00

Create Cycle

Close

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.

Cycle Invoicing Process

Cycle Information

Cycle: 560 Amount: \$434.00
 Month: October 2024 Count: 1
 Invoice Group #: None Thru Day: 1
 Created: 7/23/2024
 Description: 01-Oct-24 - Modern Tire

Invoice Information

Category: *Monitoring
 AR Account: 110110
 Use Customer Terms: ☐
 Term: Due On Receipt
 Invoice Date: 10/1/2024
 Invoice Description: *Recurring

Aging Date

Aging Date to Match Bill On Day: ☐
 Aging Date: 10/1/2024

ACH Hold Date

ACH Hold Date to Match Bill On Day: ☐
 ACH Hold to Process Date: 7/23/2024

Memo

Have to do the cycle invoice - shows amounts for both cycle and service - must post!

Print Save **Post** Close

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

abc fire solutions

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	25.00	25.00
1.00	Access Control, 10/1/2024 - 10/31/2024		
1.00	Service Part	100.00	100.00
1.00	Access Control, 7/23/2024 - 7/23/2024		
1.00	Service Ticket#3516		
1.00	Minimum Service Call Charge	25.00	25.00
1.00	Access Control, 7/23/2024 - 7/23/2024		
1.00	Service Ticket#3516		
1.00	Service Labor	140.00	140.00
1.00	Access Control, 7/23/2024 - 7/23/2024		
1.00	Service Ticket#3516		
3.00	Recurring Mon Services II	48.00	144.00
3.00	Access Control, 10/1/2024 - 12/31/2024		
Subtotal:			\$434.00
Tax			33.64
Payments/Credits Applied			0.00
Invoice Balance Due:			\$467.64