

How To Set Default Bill To for Service Tickets on Standard Customer

09/23/2024 3:04 pm EDT

If a Standard Customer has more than one Bill To and multiple Sites, you have the option to set up different default Bill To's for Service Tickets per Site.

You will need to confirm that "Primary Service" is not selected within any of the Active Bill To's on the Account.

Only One Bill To Address can be selected for "Primary Service" at a time but is not required.

Customer Account - Bill To

Go to the Customer Account and right click on the Primary Bill To, which will be the first Bill To Address listed, and select Edit Billing Information.

If the "Primary Service" box is selected, uncheck the box and Save.

The screenshot shows a software window titled "Customer Billing 48977". Inside, there's a "Customer Information" section with fields for "Customer # 48977" and "Customer Name Elizabeth Arrington". Below this are tabs for "Billing Information", "Contacts", and "Email Addresses". The "Billing Information" tab is active, showing a form with fields for "Name" (Elizabeth Arrington - Primary Billing), "Additional Name", "Address..." (123456 Seaside Avenue, Fairhope, AL 36532), "Phone 1", "Phone 2", "Fax", and "Primary Email". There are also checkboxes for "Residential" (selected), "Commercial", "Inactive", "Primary Mail", "Primary RMR" (checked), "Primary Service" (unchecked and highlighted with a red box), "Primary Job", "Primary Other" (checked), and "Copy Billing Address to Site". At the bottom right, there are "Save" and "Close" buttons, with the "Save" button highlighted by a red box.

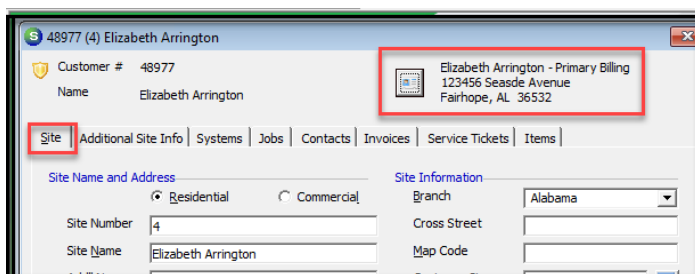
By unchecking that box this will allow different Bill To's to be set as the default for Service Tickets.

If the “Primary Service” box is not selected on the Primary Billing Address, then open each of the remaining Active Bill To's to confirm that box is not selected.

Customer Site(s)

Right-click on the Site and select Edit Site.

In the top right corner, is the current Bill To selected for that Site. Since, the “Primary Service” box is no longer selected within the Active Bill To's, this is the Address the Service Tickets will default to when Invoiced.



The screenshot shows a software window titled "48977 (4) Elizabeth Arrington". The window contains a tabbed interface with tabs for "Site", "Additional Site Info", "Systems", "Jobs", "Contacts", "Invoices", "Service Tickets", and "Items". The "Site" tab is selected. Below the tabs, there are two main sections: "Site Name and Address" and "Site Information". In the "Site Name and Address" section, there are radio buttons for "Residential" (selected) and "Commercial". Below these are input fields for "Site Number" (containing "4") and "Site Name" (containing "Elizabeth Arrington"). In the "Site Information" section, there is a "Branch" dropdown menu (set to "Alabama"), a "Cross Street" input field, and a "Map Code" input field. A red box highlights a small icon in the top right corner of the window, next to the text "Elizabeth Arrington - Primary Billing 123456 Seaside Avenue Fairhope, AL 36532".

If that Bill To needs to be changed, then click on the Box by the Bill To and select the correct one and Save.

48977 (4) Elizabeth Arrington

Customer # 48977

Name Elizabeth Arrington

Elizabeth Arrington - Primary Billing
123456 Seaside Avenue
Fairhope, AL 36532

Site | Additional Site Info | Systems | Jobs | Contacts | Invoices | Service Tickets | Items

Site Name and Address

Site Number 4

Site Name Elizabeth Arrington

Site Information

Branch Alabama

Cross Street

Map Code

Name	Address 1	City	State	Zip Code	Is Primary
Elizabeth Arrington - Pri...	123456 Seaside Avenue	Fairhope	AL	36532	Y
Elizabeth Arrington - La...	7899 River Road	Daphne	AL	36526	N

Save Close

Service Ticket

Now when a Service Ticket is created for that specific Site, the Bill To will default to the Address selected.

Ticket #10293

Service Ticket | Prevailing Wage | Appointments and Labor | Billing | Documents | Equipment and Parts | Journal | Notes | Other Items | Purchase Orders | Ticket Log | Ticket Group | Critical Messages (1)

Customer 48977 Elizabeth Arrington

Site Elizabeth Arrington
2345 Sunny Lane
Daphne, AL 36526
Central Time

Created 9/22/2024 12:09 PM

Created By AEB

Status Open

Contact

Phone

Ext

Notify

Billing Overrides

☐ Override Warranty

☐ Override Service Level

Invoice

☐ Third Party Bill To

Bill To Elizabeth Arrington - Primary Billing

Contact

Invoice Date 9/22/2024

Ticket Charges

	Cost	Tax
Total Parts	0.00	0.00
Total Labor	0.00	0.00
Total Other	299.98	26.25
Sub Total	299.98	26.25
Total Pending Ticket Resolution		\$326.23

Bill to Cycle

Next Cycle Date 10/1/2024

FSU

Payment Received

Remittance

Save

