

How to Include All Subaccounts RMR on one Cycle Invoice Billed to the Master

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Below are the steps to create One Cycle Invoice that includes All Subaccount RMR that is billed to the Master Account.

Master Account

From the Master Account, right-click on Customer Information and select Edit Customer Setup.

When the Customer Setup screen opens, under the Invoice Printing Section, Uncheck the box next to Separate Cycle Invoice for Each Site. Save.

The screenshot shows the 'Customer Setup 10024' window. The 'Customer #' is 10024, and the customer name is 'Hoffman Auto Group-New'. The address is 'Hoffman Auto Group Inc Billing, 650 Connecticut Street, Canton, MI 48188'. The 'Setup Information' tab is selected. In the 'Invoice Printing' section, the 'Separate Cycle Invoice for Each Site' checkbox is unchecked and highlighted with a red box. Other settings include 'Customer Status' as 'ANR', 'Customer Type' as 'Commercial', 'Terms' as 'Due On Receipt', 'Tax Exempt #' as '123456', 'EIN' as an empty field, 'OK to Increase' as an empty field, 'Salesperson' as 'Matt.Miller', 'Commission Pctg' as '0.00', 'Registration Code' as '484391', 'Blanket P.O.' as an empty field, 'P.O. Expire Date' as an empty field, 'Customer Since' as '2/26/2004', 'Chain Account' as an empty field, 'Customer Group' as 'MI', 'Customer Group 2' as 'MI', 'Branch' as 'FL', 'Invoice Group' as 'None', 'No Collections' as an unchecked checkbox, and 'Part Pricing Level' as 'None'.

Field	Value
Customer #	10024
Customer Name	Hoffman Auto Group-New
Additional Name	
Customer Status	ANR
Customer Type	Commercial
Old Customer ID	
Terms	Due On Receipt
Tax Exempt #	123456
EIN	
OK to Increase	
Salesperson	Matt.Miller
Commission Pctg	0.00
Registration Code	484391
Blanket P.O.	
P.O. Expire Date	
Customer Since	2/26/2004
Chain Account	
Customer Group	MI
Customer Group 2	MI
Branch	FL
Invoice Group	None
No Collections	☐
Part Pricing Level	None
Is Master Account	☒
Account Index	41 (For Auto Numbering)
Default New Sub-Accounts to Bill to Master Account	☐
Print Statements	☒
Print Site Info on Invoices	☒
Separate Cycle Invoice for Each Site	☐
Charge Late Fees	☒