

When Master Account Bill to should be Primary - How to Fix Master Bill To Showing N/A

07/18/2025 11:04 am EDT

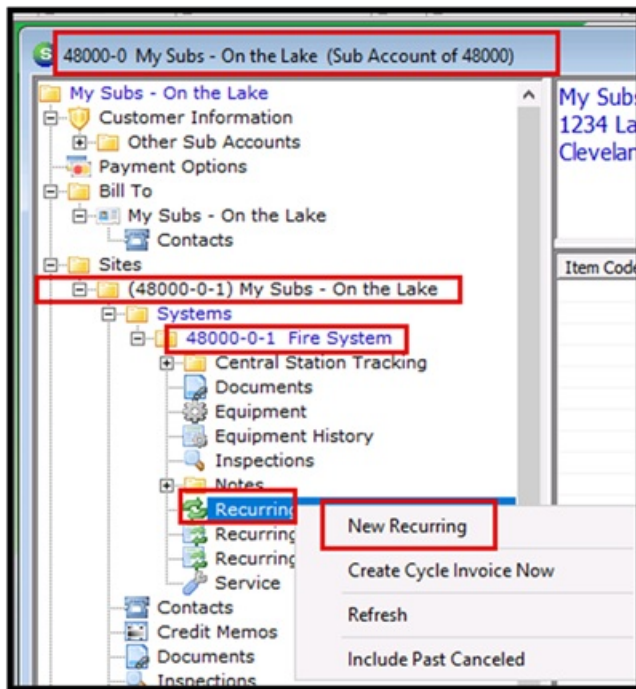
The steps below will show how to fix the "Bill To" for a new recurring record on a Subaccount when the address shows as N/A when billing to a Master Account. For use when you want the master account to be the primary "Bill To" address on the subaccount.

Overview

The steps will show the full process and assume the user has the permissions to perform them.

Steps:

1. Open the Subaccount, click on Sites, click on the Site, click on the System, right-click on Recurring, then select New Recurring.



2. If the "Bill To" address changes to N/A after clicking on the "Receive to Master" check box, then follow the next steps to fix this issue.

New Recurring Item48000-0

Site and System

My Subs - On the Lake
1234 Lake Rd
Cleveland, OH 44109

System 48000-0-1
Fire

Panel Type

☒ Receivable to Master

N/A

3. In SedonaOffice, click on Client Management, then select Master Account Mgmt.

SedonaOffice

Demo V6 Manitou

Client Management

Cancellations

Collections

Company Rate Change

Customer Explorer

Customer Query Builder

EFT Customer

Manage Chain Accounts

Master Account Mgmt

New Customer

4. Select the Master Account from the Master Account List Window.

Master Account List

Criteria

☒ Pre-Load all Master Accounts

☒ Display Active RMR

☒ Display Number of Sub Accounts

☒ Display Net AR Due

☒ Display Last Cycle Date

Match 48000

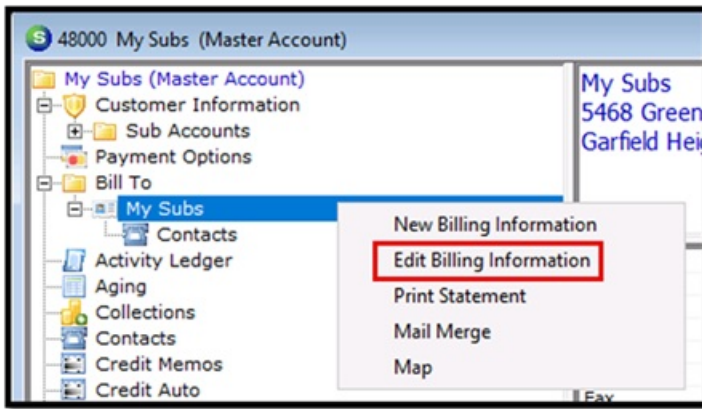
☐ Exact

☒ Beginning

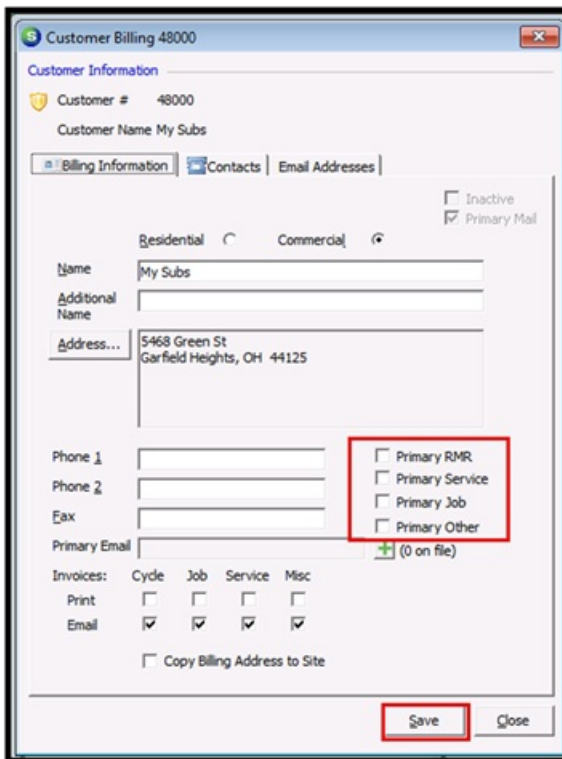
☐ Contains

Master Account Number	Name	Active RMR	No. of Sub Accounts	Net AR Due	Last Cycle
48000	My Subs	0.00	0	0.00	

5. In the Master Account, right-click on the Master Account "Bill To", then select Edit Billing Information.



6. In the Billing Information Tab, if the Primary Options by the phone numbers are not marked, mark Primary RMR and any others that would need to show the Master Accounts "Bill To", then click Save.



7. Reopen the Subaccount, right-click on Recurring, select New Recurring, click on Receivable to Master, and this time the correct Master Account Bill To should show correctly.

48000-0 My Subs - On the Lake (Sub Account of 48000)

My Subs - On the Lake
Customer Information
Other Sub Accounts
Payment Options
Bill To
My Subs - On the Lake
Contacts
Sites
(48000-0-1) My Subs - On the Lake
Systems
48000-0-1 Fire System
Central Station Tracking
Documents
Equipment
Equipment History
Inspections
Master
Recurring
Recurring History

New Recurring Item 48000-0

Site and System

My Subs - On the Lake
1234 Lake Rd
Cleveland, OH 44109

My Subs
5468 Green St
Garfield Heights, OH +

System 48000-0-1
Fire

Panel Type

Recurring Setup | Royalties/Commissions | Changes | Escalations

Recurring Item [Dropdown]
Description [Text]
Sub Item Of [Dropdown]
Bill Cycle [Dropdown]

Show All Items
Renewal [Text]
Rate Increase [Text]
Override % [Text]
PO Number [Text]

☒ Receivable to Master

8. Complete the recurring information and save the record.