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

07/18/2025 11:04 am EDT

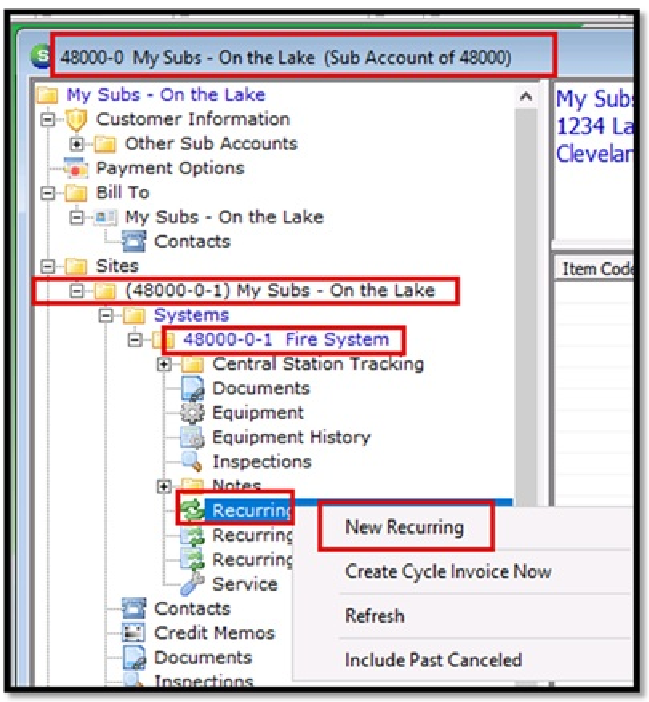
The steps below will show how to fix the "Bill To" for a new recurring record on a Subaccount when the address shows as N/A when billing to a Master Account. For use when you want the master account to be the primary "Bill To" address on the subaccount.

Overview

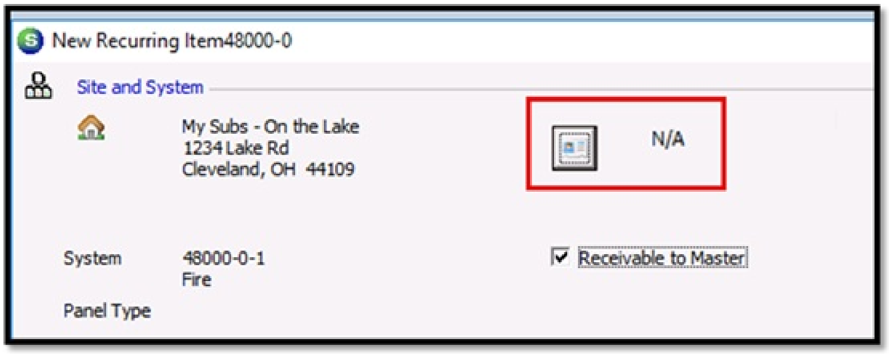
The steps will show the full process and assume the user has the permissions to perform them.

Steps:

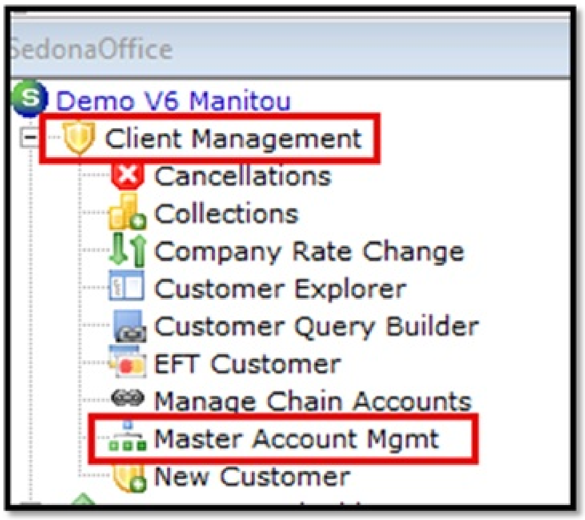
1. Open the Subaccount, click on Sites, click on the Site, click on the System, right-click on Recurring, then select New Recurring.



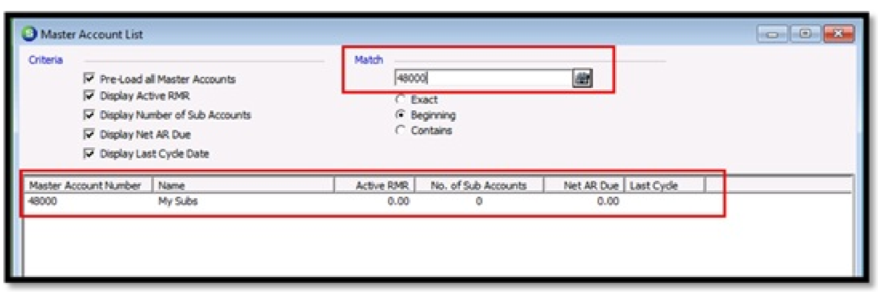
2. If the "Bill To" address changes to N/A after clicking on the "Receive to Master" check box, then follow the next steps to fix this issue.



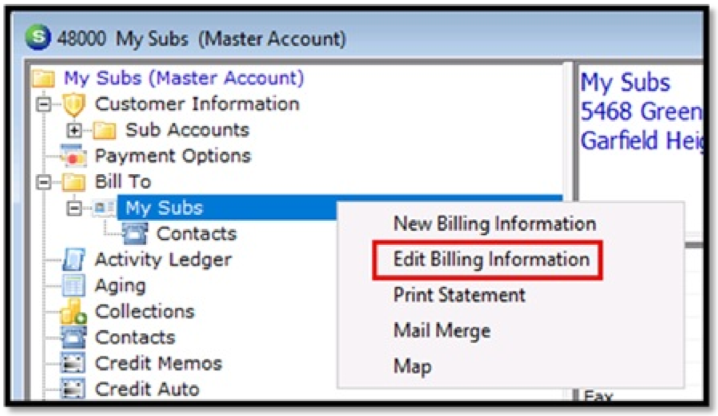
3. In SedonaOffice, click on Client Management, then select Master Account Mgmt.



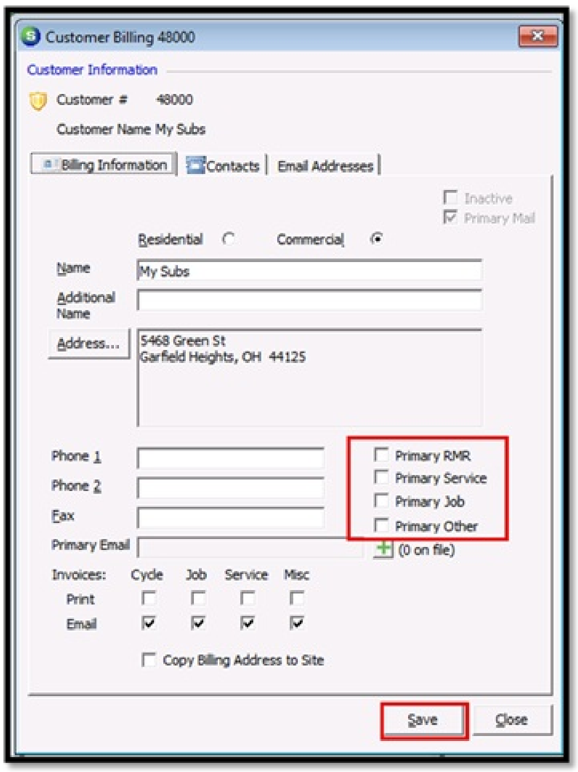
4. Select the Master Account from the Master Account List Window.



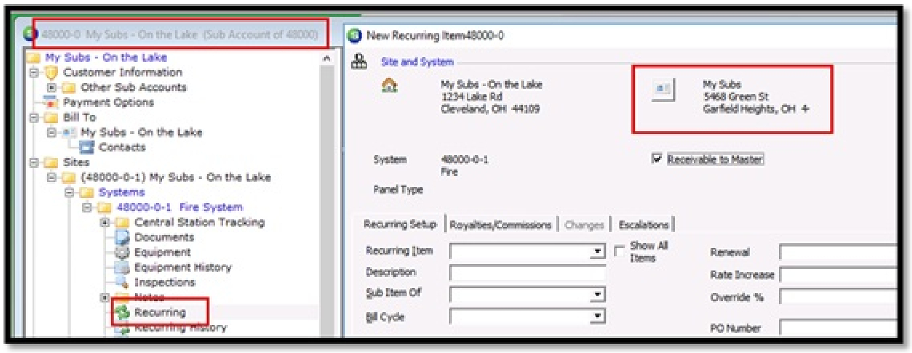
5. In the Master Account, right-click on the Master Account "Bill To", then select Edit Billing Information.



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.



8. Complete the recurring information and save the record.