

How to Create Recurring Invoice Template

The **Recurring Template** allow you to add and save common transactions for later use. For example, you may want to repeat an Invoice transaction previously used for a customer several times. Creating a recurring invoice will save time on repetitive data entry tasks.

1. Open the Invoice record you want to convert to recurring template. If the record is not yet created, refer to [How to Create Standard Invoice](#).
2. Check the **Recurring check box** button.
3. Save the invoice record.

Invoice - ABC Reseller

Menu: New Save Search Delete Undo Print Add Shipment Email Duplicate Post Recap Recurring Close

Details | Prepays and Credit Memos | Instructions | Payments (0) | Attachments (0) | Audit Log (2) | Comments (0)

Source: Standard | Recurring: ☒ | Location: 0001 - Fort Wayne | PO Number: PO#02 | Invoice No: SI-462

Type: Invoice | Bill To: ABC Reseller | Freight Term: | Deliver/Pickup: Pickup | Split: |

Customer: ABC Reseller | Ship To: ABC Reseller | Ship Date: 7/4/2016 | Salesperson: Jared Smith

Invoice Date: 7/4/2016 | Ship Via: UPS | Account: 12000-0000-000 | Currency: USD | Accrual: 1

Post Date: 7/4/2016 | Terms: 5% 5, | Due Date: 8/3/2016 | Comments: Recurring Invoice.

Item No.	Contract No.	Sequence	Description	Ordered	Order UOM	Shipped	UOM	Discount %	Tax	Sub Cur	Price	Total	Tax Group	Weight UOM
<input type="checkbox"/>			misc item	0.00	10.00			0.00%	0.00		5.130000	51.30		
<input type="checkbox"/>	87G		87 Unleaded Ga...	0.00	100.00		Gallon	0.00%	22.81		1.850000	185.00	IN SST	
<input type="checkbox"/>				0.00	0.00			0.00%	0.00		0.000000	0.00		

Bill To: ABC Reseller
Somewhere St.
Indianapolis, IN, 46204 United States

Ship To: ABC Reseller
Somewhere St.
Indianapolis, IN, 46204 United States

Item: On Hand: On Order (PO):
Committed: Back Order:

Subtotal: 236.30
Shipping: 0.00
Tax: 22.81
Total: 259.11
Amount Received: 0.00
Amount Due: 259.11

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4. Click the **Recurring button**. This will open the Recurring Transactions screen filtered by the invoice's record number.

Recurring Transactions

Save Undo Print Process History Close

Details | Filter Records (F3) | Clear All Filters

Transaction Type: Invoice | Contains: Invoice

Transaction No.: SI-462 | Contains: SI-462

Transaction Type	Transaction No.	Reference	Assigned User	Remind in Advanc	Frequency	Last Process	Next Process	Due	Group	Day of Month	Start Date	End Date	Active	Iterations
<input type="checkbox"/> Invoice	SI-462		IRELY ADMIN	0	Monthly	7/4/2016	8/4/2016	No		4	8/4/2016	8/4/2016	<input checked="" type="checkbox"/>	1

5. Modify the details of the Sales Order on the Recurring Transactions, if necessary.
6. Save and close the Recurring Transactions screen.

Related Topics

- [SM How To Process Recurring Transaction](#)

1. Open the Invoice record you want to convert to recurring template. If the record is not yet created, refer to [How to Create Standard Invoice](#).

2. Check the **Recurring check box** button.

Invoice - ABC Reseller

New Save Search Delete Undo Print Add Shipment Email Duplicate Post Recap Recurring Close

Details Instructions Payments (0) Attachments (0) Audit Log (0) Comments (0)

Type: Standard **Recurring: ☒** Bill To: ABC Reseller Freight Term: Invoice No: SI-202 Split: Customer: ABC Reseller Ship To: ABC Reseller Deliver/Pickup: PO Number: BOL Number: Invoice Date: 04/21/2016 Post: 04/21/2016 Ship Via: UPS Due Date: 05/21/2016 Salesperson: Jared Smith Currency: USD Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Accrual: 1 Ship Date: 05/21/2016 Comments: Sample Recurring Invoice.

Item No	Contract No	Contract Seq	Description	Ordered	Order UOM	Shipped	UOM	Discount	Tax	Sub Currency	Price	Total	Weight UOM	Tax Group
1			Sample serv...	0.00	1.00	8hrs		0.00%	6.47		80.880000	80.88	IN SST	
				0.00		0.00		0.00%	0.00		0.000000	0.00		

Bill To: ABC Reseller Somewhere St, Indianapolis, IN, 46204 United Item: On Hand: On Order (PO): Subtotal: 80.88 Ship To: ABC Reseller Somewhere St, Indianapolis, IN, 46204 United Committed: Back Order: Shipping: 0.00 Tax: 6.47 Total: 87.35

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3. Save the Invoice. The **Recurring Transactions** screen filtered by the invoice number will be displayed.

Recurring Transactions

Save Undo Print Process History Close

Details

+ Insert X Remove ☒ Select Due ☐ Clear All ☒ Layout Filter Records (F3) X Clear All Filters

X Transaction Type: Equals Invoice X Transaction No.: Equals SI-202

Transaction Type	Transaction No.	Reference	Assigned User	Remind in Advance	Frequency	Last Process	Next Process	Due	Group	Day of Month	Start Date	End Date	Active	Iterations
Invoice	SI-202		IRELY ADMIN	0	Monthly	04/21/2016	05/21/2016	No		21	05/21/2016...	05/21/2016...	<input checked="" type="checkbox"/>	1

4. Modify the details of the Invoice on the Recurring Transactions, if necessary.
5. Save and close the screen.
6. To review the recurring details at a later time, click the **Recurring** button on the Invoice.

Invoice - ABC Reseller

New Save Search Delete Undo Print Add Shipment Email Duplicate Post Recap **Recurring** Close

Details Instructions Payments (0) Attachments (0) Audit Log (1) Comments (0)

The **Recurring Invoice Template** allow you to add and save common transactions for later use. For example, you may want to repeat an Invoice transaction previously used for a customer several times. Creating a recurring invoice will save time on repetitive data entry tasks.

1. Open the Invoice record you want to convert to recurring template. If the record is not yet created, refer to [How to Create Standard Invoice](#).
2. Check the **Recurring check box** button. If the record is not yet saved, the system will auto-save the record before opening the **Convert To Template** screen.

Invoice - ABC Reseller

New Save Search Delete Undo Print Add Shipment Email Post Recap Close

Details Attachments Audit Log

Type: Standard **Recurring: ☒** Bill To: ABC Reseller Freight Customer: 0001005066 Ship To: ABC Reseller Delive Invoice Date: 01/20/2016 Post: 01/20/2016 Ship Via: Due D

3. Fill out the fields on Convert To Template screen.
 - a. **Reference.** This will show the Invoice | Comments by default. Enter in this field any additional info about the invoice.
 - b. **Warning Days.** Enter in this field the number of days that you want to be reminded in advance when this invoice is about to be due.
 - c. **Iteration.** This field will show 1 by default. This is used to display how many times the transaction is to be recurred. Changing the number of this field will simultaneously change the End Date.
 - d. **Frequency.** This field is where you set how often a transaction recurs. By default, it is set to **Monthly**. In case you want to change the setup, click the Frequency combo box button and select a different frequency from the list. Frequency occurrences in a year is as follows:
 - i. **Daily** = 365
 - ii. **Weekly** = 52
 - iii. **Bi-Weekly** = 26
 - iv. **Semi-Monthly** = 24

- v. **Monthly** = 12
 - vi. **Bi-Monthly** = 6
 - vii. **Quarterly** = 4
 - viii. **Semi-Annually** = 2
 - ix. **Annually** = 1
 - e. **Last Process.** This field will automatically be filled in with the Invoice Date. Enter a different date if necessary.
 - f. **Next Process.** This field will automatically be filled based on the Frequency and Last Process entered. This can be changed to whatever date you want the transaction to recur again.
 - g. **Start Date.** This field will automatically be filled in with the Invoice Date. You may set this to any date if necessary by entering date manually or by clicking the date picker button and select different date from the mini calendar screen.
 - h. **End Date.** This field by default will show the same date shown in the Next Process field. This field is also auto-updated when you change the value in Iteration and Start Date fields. You may set this to any date if necessary by entering date manually or by clicking the date picker button and select different date from the mini calendar screen.
 - i. **Day of the Month.** This field will be default to the Invoice Date's day. To change, click Day of Month combo box button and select different day from the list.
4. Click **OK button**. This will automatically add an entry to the **Recurring Transaction** screen. The details of the inserted transaction is based on the details entered above.

Here is a sample invoice, its template details, and the inserted record on Recurring Transaction screen.

Invoice - ABC Reseller

Details | Attachments | Audit Log

Type: Standard | Recurring: ☒ | Bill To: ABC Reseller | Freight Term: | Invoice No: SI-45

Customer: 0001005066 | Ship To: ABC Reseller | Deliver/Pickup: | PO Number: | BOL Number: |

Invoice Date: 01/20/20 | Post: 01/20/201 | Ship Via: | Due Date: 01/20/2016 | Salesperson: 00010050 | Currency: USD |

Location: 0001 - Fort Wayne | Terms: Due on Receipt | Ship Date: 01/20/2016 | Comments: Sample recurring invoice templa |

Item No	Contract...	Contract...	Description	UOM	Ordered	Shipped	Discount	Tax	Price	Total	Tax Group
+	TNKRENT		Tank Rent	Each	0.00	1.00	0.00	0.00	55.110000	55.11	
+					0.00	0.00	0.00	0.00	0.000000	0.00	

Bill To: ABC Reseller
Somewhere St.
Fortville, IN 46040 United

Ship To: ABC Reseller
Somewhere St.
Fortville, IN 46040 United

Item: On Hand: On Order (PO):
Committed: Back Order:

Subtotal: 55.11
Shipping: 0.00
Tax: 0.00
Total: 55.11

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Convert To Template

OK Cancel

Reference: Sample recurring invoice template.

Warning Days: 2 Iteration: 11

Frequency: Monthly

Last Process: 01/01/2016 Next Process: 02/01/2016

Start Date: 01/01/2016 End Date: 12/01/2016

Day of the Month: 1

Ready

Recurring Transactions

Transaction Type	Transaction No.	Reference	Assigned User	Remind in Adv...	Frequency	Last Process	Next Process	Due	Group	Day of Month	Start Date	End Date	Active	Iterations
Bill	BL-1			0	Quarterly	01/01/2015	04/01/2015	Yes		1	04/01/2015	01/01/2016	<input type="checkbox"/>	3
General Journal	GI-5		Matt Wielinski	10	Monthly	10/27/2015	11/27/2015	Yes		27	11/27/2015	11/27/2015	<input type="checkbox"/>	1
Invoice	SI-45	Sample recurrin...	JRELY ADMIN	2	Monthly	01/01/2016	02/01/2016	No		1	01/01/2016	12/01/2016	<input checked="" type="checkbox"/>	11

Ready

