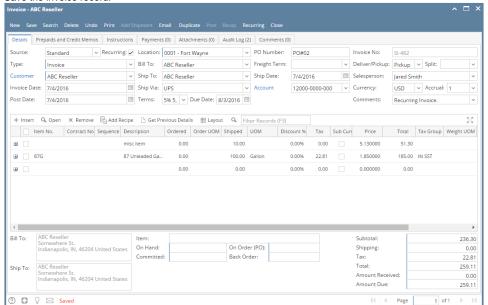
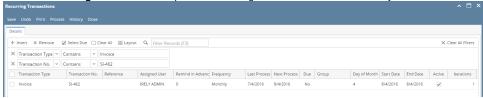
How to Create Recurring Invoice Template

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.



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

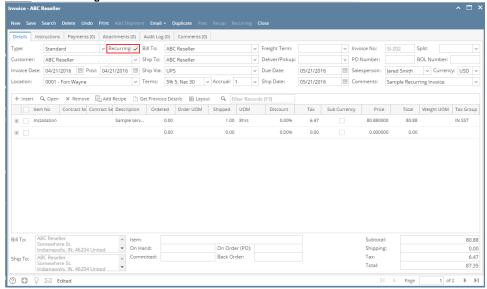


- 5. Modify the details of the Sales Order on the Recurring Transactions, if necessary.
- 6. Save and close the Recurring Transactions screen.

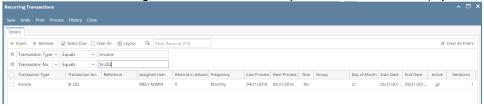
Related Topics

- 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.



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

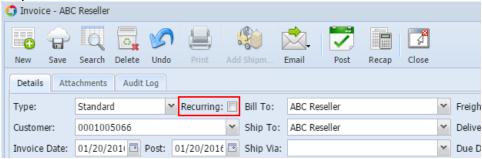


- 4. Modify the details of the Invoice on the Recurring Transactions, if necessary.
- 5. Save and close the screen.
- To review the recurring details at a later time, click the Recurring button on the Invoice.



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.
- 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.



- 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 may 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.

