

How to Create Sales Order Recurring Template

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

1. Open the Sales Order record you want to convert to recurring template. If the record is not yet created, refer to [How to Create Standard Sales Order](#). Note that only the sales order that are not yet processed to invoice or inventory shipment can be converted to recurring template.
2. Check the **Recurring check box** button.
3. Save the sales order record.

Sales Order - ABC Reseller

New Save Search Delete Undo Print Blend Pick Ticket Pick List Ship Invoice Duplicate Recurring Close

Details Instructions Payments (0) Attachments (0) Audit Log (2) Comments (0) Approval (0)

Type: Standard Recurring: ☒ Bill To: ABC Reseller PO Number: PO#05 Order No: SO-170

Customer: ABC Reseller Ship To: ABC Reseller BOL No: BOL#05 Split:

Date: 7/1/2016 Ordered By: irelyadmin Status: Open Salesperson: Jared Smith

Due Date: 7/31/2016 Ship Via: UPS Freight Term: Pickup Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Comments: Recurring SO

Item No	Contract No	Contract Sequence	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
<input type="checkbox"/> 87G			87 Unleaded Ga...	Gallon	0.00	100.00	10.00%	22.81	1.850000	166.50	IN SST
<input type="checkbox"/>			sample misc ite...		0.00	1.00	0.00%	0.00	10.500000	10.50	
<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): Quote: Subtotal: 177.00

Committed: Back Order: Shipping: 0.00

Tax: 22.81

Total: 199.81

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

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 Contains Sales Order

X Transaction No. Contains SO-170

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
Sales Order	SO-170		IRELY ADMIN	0	Monthly	7/1/2016	8/1/2016	No		1	8/1/2016	8/1/2016	<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 Sales Order record you want to convert to recurring template. If the record is not yet created, refer to [How to Create Standard Sales Order](#).
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**.

Sales Order - ABC Reseller

New Save Search Delete Undo Print Pick Ticket Ship Invoice Duplicate Customer Close

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

Type: Standard Recurring: ☒ Bill To: ABC Reseller Order

Customer: ABC Reseller Ship To: ABC Reseller PO No:

3. Fill out the fields on Convert To Template screen.
 - a. **Reference**. This will show the Sales Order | Comments by default. Enter in this field any additional info about the order.
 - b. **Warning Days**. Enter in this field the number of days that you want to be reminded in advance when this order 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 Sales Order 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 Sales Orders 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 sales order, its template details, and the inserted record on Recurring Transaction screen.

Sales Order - ABC Reseller

New Save Search Delete Undo Print Pick Ticket Ship Invoice Duplicate Customer Close

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

Type: Standard Recurring: ☒ Bill To: ABC Reseller Ordered By: irelyadmin Order No: SO-77

Customer: ABC Reseller Ship To: ABC Reseller PO Number: PO#05 Salesperson: Jared Smid Status: Open

Date: 04/19/2016 Due: 05/19/2016 Ship Via: UPS BOL No: BOL#05 Split: Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Freight Term: Deliver Comments: Sample SO recurring template.

+ Insert Open X Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Contract No	Contract Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
87G		87 Unleaded Gasoline	Gallon	0.00	100.00	0.00%	16.65	1.850000	185.00	IN SST
		sample misc item		0.00	1.00	0.00%	0.00	10.500000	10.50	
				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): Quote: Subtotal: 195.50

Ship To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United Committed: Back Order: Shipping: 0.00

Tax: 16.65

Total: 212.15

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Convert To Template

OK Cancel

Details

Reference: Sample SO recurring template.

Warning Days: 1 Iteration: 21

Frequency: Monthly

Last Process: 04/19/2016 Next Process: 05/19/2016

Start Date: 04/19/2016 End Date: 12/19/2017

Day of the Month: 19

Ready

Recurring Transactions

Save Undo Print Process History Close

Details

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

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-30		Kris Helms	0	Annually	12/28/2015	12/28/2016	No		28	12/29/2015	12/29/2016	<input checked="" type="checkbox"/>	1
Invoice	SI-31		Kris Helms	0	Quarterly	12/28/2015	04/28/2016	No		28	01/01/2016	05/01/2016	<input checked="" type="checkbox"/>	1
Invoice	SI-32		George Olney	0	Monthly	12/29/2015	01/29/2016	Yes		29	12/29/2015	01/29/2016	<input checked="" type="checkbox"/>	1
General Journal	GJ-33		George Olney	25	Monthly	12/18/2015	12/24/2015	No		18	01/18/2016	01/18/2016	<input type="checkbox"/>	1
Invoice	SI-33		George Olney	0	Annually	12/29/2015	12/29/2016	No		29	12/29/2015	12/29/2016	<input checked="" type="checkbox"/>	1
Invoice	SI-36		George Olney	0	Monthly	12/29/2015	01/29/2016	Yes		29	12/29/2015	01/29/2016	<input checked="" type="checkbox"/>	1
Invoice	SI-39		Kris Helms	0	Monthly	12/30/2015	01/30/2016	Yes		30	12/30/2015	01/30/2016	<input checked="" type="checkbox"/>	1
Invoice	SI-42		IRELY ADMIN	0	Monthly	04/01/2016	05/01/2016	No		1	04/01/2016	11/01/2016	<input checked="" type="checkbox"/>	20
Invoice	SI-42		IRELY ADMIN	0	Daily	03/07/2016	03/08/2016	No		7	04/07/2016	05/06/2016	<input checked="" type="checkbox"/>	30
Sales Order	SO-77	Sample SO recurring	IRELY ADMIN	1	Monthly	04/19/2016	05/19/2016	No		19	04/19/2016	12/19/2017	<input checked="" type="checkbox"/>	21
Invoice	SI-126	recur01	IRELY ADMIN	0	Weekly	01/15/2016	01/22/2016	Yes			01/08/2016	05/20/2016	<input checked="" type="checkbox"/>	20
Invoice	SI-132		IRELY ADMIN	0	Monthly	04/06/2016	05/06/2016	No		6	05/06/2016	05/06/2016	<input checked="" type="checkbox"/>	1

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

Sales Order - ABC Reseller

New Save Search Delete Undo Print Ship Invoice Duplicate Customer Close

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

Type: Standard Recurring: ☐ Bill To: ABC Reseller Ordered By:

Customer: ABC Reseller Ship To: ABC Reseller PO Number:

Date: 01/20/2016 Due: 01/25/2016 Ship Via: BOL No:

3. Fill out the fields on Convert To Template screen.

- a. **Reference.** This will show the Sales Order | Comments by default. Enter in this field any additional info about the order.
 - b. **Warning Days.** Enter in this field the number of days that you want to be reminded in advance when this order 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 Sales Order 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 Sales Orders 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 sales order, its template details, and the inserted record on Recurring Transaction screen.

Sales Order - ABC Reseller

New Save Search Delete Undo Print Ship Invoice Duplicate Customer Close

Details Payments (0) Attachments (0) Audit Log (2) Comments (0)

Type: Standard Recurring: ☒ Bill To: ABC Reseller Ordered By: irelyadmin Order No: SO-46

Customer: ABC Reseller Ship To: ABC Reseller PO Number: Salesperson: Mike Mori Status: Open

Date: 01/20/2016 Due: 01/25/2016 Ship Via: BOL No: Split: Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5 Net 30 Freight Term: Pickup Comments: Sample SO recurring template.

Item No	Contract...	Description	UOM	Shipped	Ordered	Discou...	Tax	Price	Total	Tax Gro...
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. Indianapolis, IN, 46204 United Item: TNKRENT - Tank Rent Subtotal: 55.11

Ship To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United On Hand: 0.00 On Order (PO): 0.00 Shipping: 0.00

Committed: 0.00 Back Order: 0.00 Tax: 0.00 Total: 55.11

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Convert To Template

OK Cancel

Details

Reference: Sample SO recurring template.

Warning Days: 1 Iteration: 10

Frequency: Monthly

Last Process: 01/20/2016 Next Process: 02/20/2016

Start Date: 01/20/2016 End Date: 11/20/2016

Day of the Month: 20

Ready

Recurring Transactions

Save Undo Print Process History Close

Details

Transaction Type	Transaction No.	Reference	Assigned User	Remind in Adv...	Frequency	Last Proc...	Next Proc...	Due	Group	Day of Mo...	Start Date	End Date	Active	Iterations
Voucher	BL-1			0	Quarterly	01/01/2015	04/01/2015	Yes		1	04/01/20...	01/01/20...	<input type="checkbox"/>	3
General Journal	GJ-5		Matt Wielinski	10	Monthly	10/27/2015	11/27/2015	Yes		27	11/27/20...	11/27/20...	<input type="checkbox"/>	1
Sales Order	SO-46	Sample SO rec...	IRELY ADMIN	1	Monthly	01/20/2016	02/20/2016	No		20	01/20/20...	11/20/20...	<input checked="" type="checkbox"/>	10
Invoice	SI-68		IRELY ADMIN	1	Daily	12/01/2015	12/02/2015	Yes		1	12/01/20...	12/31/20...	<input type="checkbox"/>	30
Invoice	SI-79		IRELY ADMIN	0	Monthly	12/22/2015	01/22/2016	No		22	12/22/20...	01/22/20...	<input checked="" type="checkbox"/>	1
Invoice	SI-82		IRELY ADMIN	0	Monthly	01/06/2016	02/06/2016	No		6	01/05/20...	02/05/20...	<input type="checkbox"/>	1
Invoice	SI-136	Sample invoice...	IRELY ADMIN	2	Monthly	01/01/2016	02/01/2016	No		1	01/01/20...	12/01/20...	<input checked="" type="checkbox"/>	11

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

Sales Order - ABC Reseller

New Save Search Delete Undo Print Process Duplicate Customer Close

Details Attachments Audit Log

Type: Standard Recurring: ☐ Bill To: ABC Reseller

Customer: 0001005066 Ship To: ABC Reseller

3. Fill out the fields on Convert To Template screen.

- a. **Reference.** This will show the Sales Order | Comments by default. Enter in this field any additional info about the order.
 - b. **Warning Days.** Enter in this field the number of days that you want to be reminded in advance when this order 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 Sales Order 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 Sales Orders 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 sales order, its template details, and the inserted record on Recurring Transaction screen.

Sales Order - ABC Reseller

New Save Search Delete Undo Print Process Duplicate Customer Close

Details Attachments Audit Log

Type: Standard Recurring: ☒ Bill To: ABC Reseller Ordered By: irelyadmin Order No: SO-3
 Customer: 0001005066 Ship To: ABC Reseller PO Number: Salesperson: 0001005049 Status: Open
 Date: 01/20/2016 Due: 01/20/2016 Ship Via: BOL No: Split: Currency: USD
 Location: 0001 - Fort Wayne Terms: Due on Receipt Freight Term: Comments: Sample SO template.

Insert View Remove Get Previous Details Layout Filter Records (F3)

Item No	Contract...	Contract...	Description	UOM	Shipped	Ordered	Discoun...	Tax	Price	Total	Tax Group
+	TKNRENT		Tank Rent	Each	0.00	1.00	0.00	0.00	55.330000	55.33	
+					0.00	0.00	0.00	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Fortville, TN 46040 United States
 Ship To: ABC Reseller Somewhere St. Fortville, TN 46040 United States

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

Subtotal: 55.33
 Shipping: 0.00
 Tax: 0.00
 Total: 55.33

Saved Page 1 of 1

Convert To Template

OK Cancel

Reference: Sample SO template.

Warning Days: 1 Iteration: 10

Frequency: Monthly

Last Process: 01/20/2016 Next Process: 02/20/2016

Start Date: 01/20/2016 End Date: 11/20/2016

Day of the Month: 20

? Ready

Recurring Transactions

Save Undo Print Process History Close

Insert Remove Select Due Clear All Layout Filter Records (F3)

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	GJ-5		Matt Wielinski	10	Monthly	10/27/2015	11/27/2015	Yes		27	11/27/2015	11/27/2015	<input type="checkbox"/>	1
Order	SO-3	Sample SO tem...		1	Monthly	01/20/2016	02/20/2016	No		20	01/20/2016	11/20/2016	<input checked="" type="checkbox"/>	10
Invoice	SI-45	Sample recurr...		2	Monthly	01/01/2016	02/01/2016	No		1	01/01/2016	12/01/2016	<input checked="" type="checkbox"/>	11
				0				No					<input type="checkbox"/>	

Ready