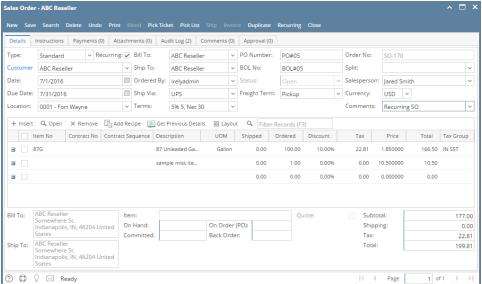# How to Create Sales Order Recurring Template

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.
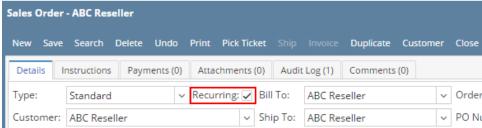3. Save the sales order record.

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

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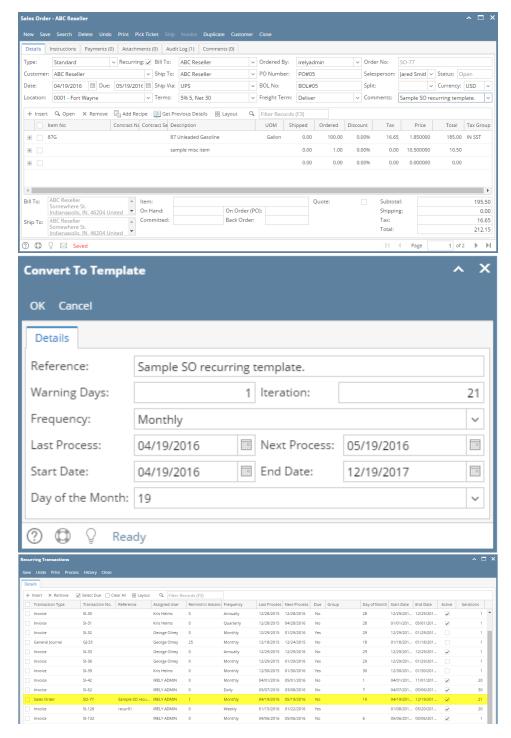6. Save and close the Recurring Transactions screen.

Related Topics

- SM How To Process Recurring Transaction

1. Open the 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**.

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 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 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.

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**.

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 may times the transaction is to be recurred. Changing the number of this field will simultaneously change the End Date.
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    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.
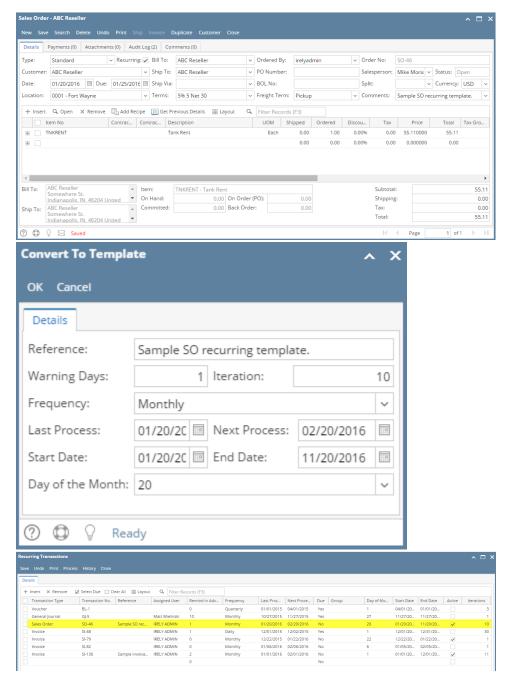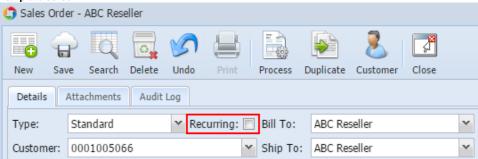
The **Recurring Invoice Template** allow you to add and save common transactions for later use. For example, you may want to repeat an Invoice transaction previously used for a customer several times. Creating a recurring invoice will save time on repetitive data entry tasks.

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**.

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 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
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    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: 01/20/20: | 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
+ ☑	TNKRENT			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, IN, 46040 United States
Ship To: ABC Reseller Somewhere St. Fortville, IN, 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 Adva...	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	☐	3
☐	General Journal	GJ-5		Matt Wielinski	10	Monthly	10/27/2015	11/27/2015	Yes		27	11/27/2015	11/27/2015	☐	1
☐	Order	SO-3	Sample SO tem...		1	Monthly	01/20/2016	02/20/2016	No		20	01/20/2016	11/20/2016	☐	10
☐	Invoice	SI-45	Sample recurrin...		2	Monthly	01/01/2016	02/01/2016	No		1	01/01/2016	12/01/2016	☑	11
☐					0				No					☐	

Ready