

# Recurring Invoices

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When a group of Customers are billed repeatedly for the same type of Product or service, a recurring Invoice may be added to increase the efficiency of entering those repetitive Invoices. Recurring Invoices are set up at *Setup / A/R / Recurring Invoices*.

The screenshot shows a software window titled "Invoice #". At the top, there are three window control buttons (minimize, maximize, close). Below these are several input fields: "<Customer ID>" with the value "AndBa", "<Comments>" with a dropdown arrow, and "Terms" with the value "(None)" and a dropdown arrow. Below these fields is a table with the following data:

	<Product Name>	Quantity	<Unit \$>	Dept ID	Prod ID
1	Tank Rent/Lease	1.000	25.00	Misc00	TankRental

At the bottom right of the window, there are two buttons: "Save" and "Cancel".

- **Customer ID** – Select a Customer for the recurring Invoice. This could be a generic Customer since a Customer Classification is selected when posting recurring Invoices.
- **Comments** – Optionally enter Comments that will appear on the recurring Invoice. Double-click the *Comment* label to select a saved comment.
- **Terms** – Optionally select the Payment Terms for the recurring Invoices.
- **Product Name** – Double-click to select the Products to be included on the recurring Invoice.
- **Quantity** – Enter the quantity for the Product.
- **Unit \$** – Enter the unit price. Double-clicking in this area displays the pricing information for the Product.
- **Dept ID** – This displays the Inventory Department ID for the selected Product.
- **Prod ID** – This displays the Product ID for the selected Product.

## Posting

This utility is helpful when virtually identical Invoices are to be sent to a group of Customers at regular intervals. At the *Post Recurring Invoices* screen found under the A/R menu, individual Customers cannot be selected. Customers who should receive a recurring Invoice should be included in a Customer Classification.

Indicate the *Invoice Location*, either *Current* or *Customer*, for the Invoices being posted. Select the *Customer Classification*, and choose **Post**.

Post Recurring Invoice

Invoice#	Location	Customer	Comments
1200535	00MAIN	Abeb Mikaela	
1200915	00MAIN	Anderson Bary	

Invoice Location:  Current  Customer

Customer Classification: Energy

Post Cancel

Each Invoice displays with the option to **Save**, **Skip**, or **Cancel**. Choosing **Save** adds the Invoice to the Customer file, inventory file, and General Ledger. **Skip** does no posting and goes to the next Customer in the Classification. **Cancel** stops the process.

Add Invoice #1200916 Customer (AndBa) 1 of 1

Invoice Analysis Tax Additional Info Source Tickets Booking Recap MFT Details

Split	ID	AndBa	?	Grain Balances	Regular	PrePay	UAC	Credit Limit
Customer		Barry Anderson		0.00	0.00	0.00	15000	
Field ID			?					
Tickets								
<Comments>								

Invoice Date: 05/15/2024  
 Due Date: 05/15/2024  
 Price By: Products  
 Price Default: Individual  
 Terms: (None)

	<Product Name>	Quantity	Inv U	Level	Status	<Unit \$>	Bill U	Total	Split	<%>	Your Share	Tax	Dept ID	Prod I
1	Tank Rent/Lease	1.000	\$	List		25.00	\$	25.00	1	100.0000	25.00	<input type="checkbox"/>	Misc00	TankR.

Prod ID:  Bar Code:

Extra Charges Discount Programs  
 Apply Rollups Manuf Billing  
 Apply To All Customers

Subtotal	25.00
Prepay \$ Used	0.00
Sales Tax	0.00
Amount Due	25.00

COD

Print Method: 1. No Roll up

Preview Cancel Skip <Back Next> Save