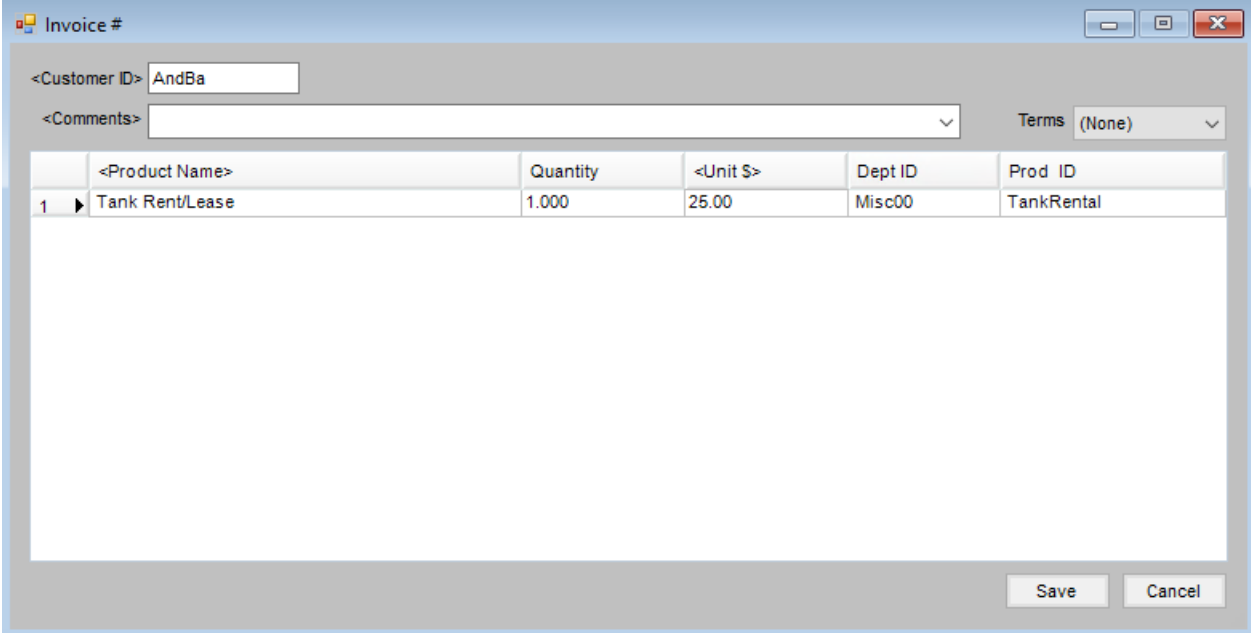


Recurring Invoices

Last Modified on 05/15/2024 10:11 am CDT

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 fields for "<Customer ID>" (containing "AndBa"), "<Comments>" (a dropdown menu), and "Terms" (set to "(None)"). Below these 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 are "Save" and "Cancel" buttons.

- **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 To All Customers:

Apply Rollups:

Print Method: 1. No Roll up Preview Cancel Skip <Back Next> Save

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

COD