# **Create a Recurring Sales Invoice**

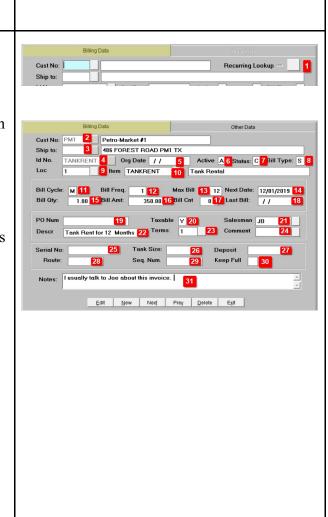
Recurring Invoices are periodic billings for things likes monthly rentals (gas tanks, rent, etc..). Recurring invoice items must exist in the inventory file.

Billing cycles may be monthly, quarterly, semiannual, annual, or number of days. When it is time to create the billing for a specific cycle, invoices are generated, printed, and updated.

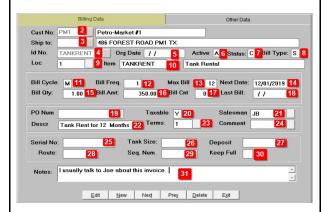
## Step 1

Jobber, Sales Invoice Entry, Recurring Invoices, Add/Change Recurring Invoices

- 1. Use the Recurring Lookup button to view existing setup.
- 2. Enter the customer number.
- 3. If the invoice is specific to a Ship To location, enter it here. Otherwise, you can leave this blank.
- 4. Enter an ID number to uniquely identify this setup record. If the ID does not exist, you will be prompted to Add it.
- 5. Enter the Original date if this is a Tank installation. Otherwise, you can leave this blank.
- 6. Choose 'A' for an Active record or 'I' to inactivate existing recurring invoices.
- 7. Enter the location if the recurring invoice is for equipment. Codes are 'I' for Inhouse, 'R' for a recurring Repair invoice or 'C' for at Customer site.
- 8. Choose a Billing Type code. Most common code used is 'S' for a recurring Sales invoice.
- 9. Enter the location of the inventory item, based on your inventory setup.
- 10. Enter the inventory item number.
- 11. Choose a billing cycle to represent how often the invoice will be created.



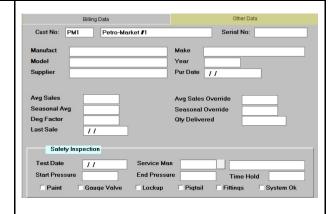
- 12. Enter the billing frequency. For example, if Cycle is 'M' (Month), enter a value of '1' for the invoice to be created once a month.
- 13. Enter the number of invoices to be created. For example, if you want to create an invoice for 12 months, Cycle is 'M' (Month), frequency is '1', enter '12' as the number of times.
- 14. Enter the Next (or First) date for this invoice to be created.
- 15. Billing quantity is normally set to '1' but this may depend on the inventory item.
- 16. Enter the invoice amount.
- 17. Bill Cnt represents how many times the invoice has been created. For new setup, this should be Zero.
- 18. Last Bill represents the last date when the invoice was created. For new setup, this should be blank.
- 19. Optional: Enter a PO number if you wish.
- 20. Enter 'Y' if the item is subject to sales tax.
- 21. Confirm the Salesman code.
- 22. Enter a small description of the invoice.
- 23. Enter the Terms for this invoice.
- 24. Enter a Comment code for the invoice if you want one.
- 25. Optional: For equipment, you may enter the serial number for reference only.
- 26. Optional: For Tanks, enter the Tank size.
- 27. Optional: Enter any deposits collected.
- 28. Optional: Enter a Route number for reports or delivery scheduling
- 29. Optional: Enter a Sequence number for reports.
- 30. Optional: For tank setup, you can enter a 'Y' to designate that the tank should be kept full.
- 31. Optional: Enter any notes for your personal reference.



#### Other Data

# Optional:

For equipment, there is Other Data that you can enter for reference. All these fields are optional and to be used only for reference.



## Step 2

Jobber, Sales Invoice Entry, Recurring Invoices, Generate Recurring Invoices

As required by the Billing Cycle, create the invoices.

- 1. Enter the Due Date for invoices to be created aAs required by the Billing Cycle. After you click the menu item, the system will compute the number of invoices to be billed and display it in a message box.
- 2. Leave Invoice Number blank to have the system assign the invoice number. You may also enter a specific number manually.
- 3. Press Enter to confirm your User ID.
- 4. If needed, enter a Comment code for thei invoice.
- 5. Confirm the batch number to be assigned for these invoices.
- 6. Enter the invoice due date.
- 7. Click 'Create Invoices'.



- 1. The system will display the Update Confirmation screen.
- 2. The system will display the update report.
- 3. Click View Errors. If there are any errors, cancel the update, fix the data and generate the invoices again.
- 4. If there are no errors, click Finish Update.

