

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 can be added to increase the efficiency of entering those repetitive Invoices.

Setup

Recurring Invoices are set up at *Setup / A/R / Recurring Invoices*.

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

- **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. On 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**.

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.

Note: Be sure to change the *Invoice* and *Due Dates* as needed. The default for the *Invoice Date* is the date the Recurring Invoice was set up, and the *Due Date* defaults to the current system date.

