

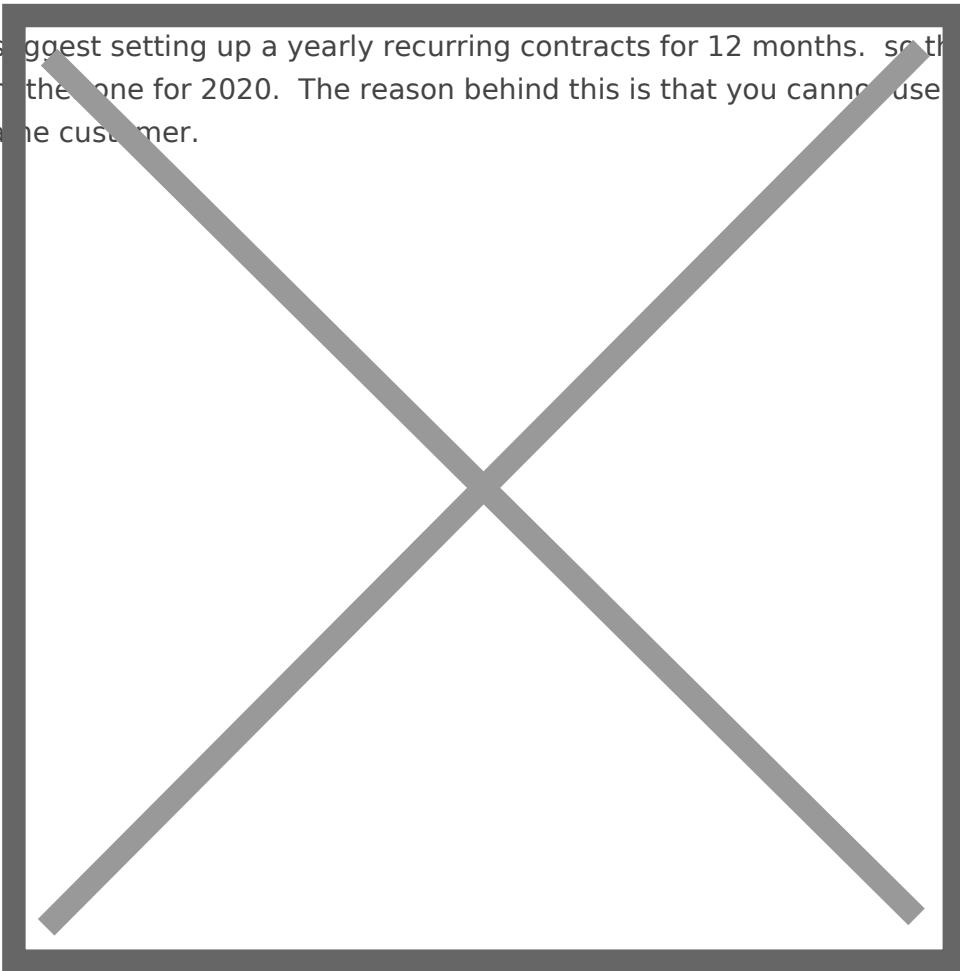
# Recurring invoices Setup

**Go to system configuration > general menu group > recurring transactions**

In this area you are going to be setting up the contract terms, which means you'll define which period the recurring is going to be running, example for a 12-month cycle and at which day you're going to be running the recurring

Enter code and put a description and a define when you want the recurring to run.

I suggest setting up a yearly recurring contracts for 12 months. so that would be one for 2019 and another one for 2020. The reason behind this is that you cannot use the same contract for the same customer.



Transaction Period setup

On the First or Last Day of each period entity e.g. Week, Month, Year etc.

Recurring Transactions

Recurring Transactions Setup

Document Type: Invoice

Code: SLA Monthly

Description: SLA Monthly

Long Description: SLA Monthly

Active: ☒

Transaction Period Setup:

☒ On the 

First

 Day Of Every:

☐ On the  Day Of Every:

☐ Every

Transaction Occurrences:

Number Of Transactions: 12

Week

Month

Year

January

February

March

April

May

June

On the 3<sup>rd</sup> Day of every period entity e.g. Week, Month, Year etc.

**Monday is day 1.**

Recurring Transactions

Recurring Transactions Setup

Document Type: Invoice

Code: SLA Monthly

Description: SLA Monthly

Long Description: SLA Monthly

Active: ☒

Transaction Period Setup:

☐ On the

☒ On the

☐ Every

3

Day Of Every:

Transaction Occurrences:

Number Of Transactions: 12

Week

Month

Year

January

February

March

April

May

June

Every 2<sup>nd</sup> Day, Every 2<sup>nd</sup> Week (Monday), Every 2<sup>nd</sup> Month – 1<sup>st</sup> day of the Month  
and Every 2<sup>nd</sup> Year – 1<sup>st</sup> day of the Year

Recurring Transactions

Recurring Transactions Setup

Document Type:

Invoice

Code:

SLA Monthly

Description:

SLA Monthly

Long Description:

SLA Monthly

Active:

☒

Transaction Period Setup:

☐ On the

Day Of Every:

☐ On the

Day Of Every:

☒ Every

2

Transaction Occurrences:

Number Of Transactions:

12

Days

Weeks

Months

Years

## Memo Button

 Save and Close

 Save

 Close

 Memo

Recurring Transaction Notes

Memos for : Recurring Transactions Notes

Search History View Memo Save & Close Save Print All Close

Memo:

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Memo History:

Page 0 of 0 No data to display

No memo history available

Revision #4