



Create Recurring Invoice Transactions

Summary

Use this guide when creating AP or AR Recurring Transactions such as orders or invoices.

Step-by-step guide

AP Invoice (Can also be done for other document types)

1. Create the invoice by navigating to Modules > Purchasing - A/P > A/P Invoice
 1. Keep the Posting Date, Due Date and Document date fields empty
 2. Right Click the background of the document and select Save as Draft (Do Not Add!)
2. Navigate to Modules > Purchasing - A/P > Recurring Transaction Templates
 1. Give the template a name in the *Template* field
 2. Select A/P Invoice in the *Type* field (or the type of document you are wanting to recur)
 3. Select the Draft you just saved in the *Doc. No.* field
 4. Identify the Recurrence Period and Date that you would like the document to generate
 5. Select the Date you want the scheduled recurrence to start
 6. The *Valid Until* field is optional
 7. Click Update once finished to save your changes

