



CRAWFORD
SOFTWARE

Recurring Invoices

Recurring Invoice(s)

- A recurring invoice is an invoice in either AR or AP that you will pay or be paid on based upon the cycle you setup.
- Examples of a recurring invoice in AP are the rent/lease payments, taxes, etc.
- An example of a recurring AR invoice might be that invoice you send to a customer once a month for leasing something from you if you are not using contracts.

Recurring Cycle Maintenance

Recurring Cycle Maintenance

File Edit Tools Actions Help

Recurring Cycle Maintenance

Recurring Cycles

Detail List

Cycle Code

Cycle Code... Inactive:

Description:

Module:

Hold Invoice:

Copy Latest Invoice:

Billing Cycle

Interval:

Modifier:

Billing Day:

Duration: Maximum Value:

Ready

Enter

- Setup a cycle code which is a collection of different settings that can be assigned to a recurring source invoice.
- Set which module this is for AP, AR or both.
- Identify the time between recurring cycles and how often it occurs
- Identify how many times the recurring invoice will be created.

Recurring Invoice Setup

AP Invoice Entry

File Edit Tools Actions Help

USD (Doc)

AP Invoice

Supplier:CDJC Invoice:2

AP Invoice Entry

Group Summary Header Lines

Detail Tax Misc Charge Comments GL Control 3rd Party Late Cost Recurring Invoices Payment Schedule

Recurring Cycle

Recurring Source:

Cycle Code: Monthly Recurrence

Duration: 12

End Date:

Maximum Value: 0.00

Hold Invoice:

Copy Latest Invoice:

Override End Date:

Inactive:

Recurring Summary

Instance Number: 1 of 0

Cumulative Balance: 0.00 of total 0.00

Last Invoice Date:

Recurring Invoice

The screenshot shows the 'AP Invoice Entry' application window. The 'Actions' menu is open, and 'Get Recurring Invoices' is selected. A dialog box titled 'Source Recurring Invoices Browse' is open, displaying a table of invoices.

Invoices						
Supplier Name	Invoice	Invoice Date	Apply Date	Doc Invoice Amount		
CDJ Consulting	2018-Recur	7/1/2018	7/1/2018	1,000,000	7/31/	

Buttons at the bottom of the dialog: OK, Cancel, Select All, Clear All.

Thank You

This presentation was meant to be an introduction to Recurring Invoice functionality in Epicor ERP. For more details on the functionality including examples, cycles, and more please contact Steve Burns - Steven.Burns@Crawford-Software.com

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