Create Periodic Invoices - BAR3150

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Accounts Receivable > Utilities > Create Periodic Invoices

This utility uses the templates from the Create/Modify Template page to create invoices that are generated every month or every quarter.

Create periodic invoices:

A list of all available invoice templates is displayed on the left side of the page.

Field	Description
Group Code	Click ⌄ to select a specific group of invoice templates. Otherwise, leave blank to display all invoice templates. Click **Retrieve**.
Due Date	This field is automatically populated with the current date but can be changed. Type a due date in the MM-DD-YYYY format or select a date from the calendar to be used when creating the invoice. If this field is blank, the selected template due date is used.

❑ Select an invoice template to create the periodic invoice.

❑ Use the following buttons to include or exclude an invoice template from the Create Periodic Invoices process.

[→] - Click to move selected entries from the left side to the right side of the page.
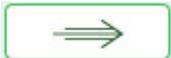
[⇒] - Click to move all entries from the left side to the right side of the page.

[←] - Click to move selected entries from the right side to the left side of the page.

[⇐] - Click to move all entries from the right side to the left side of the page.

Note: If an invoice template from one group is moved to the right side of the page, and then a new group is selected and another invoice template is moved to the right side of the page, the first invoice template is not replaced. Both invoice templates are used to create periodic invoices.

❑ Click **Execute** to execute the process.

One invoice is created for each template listed and assigns the next available invoice number to the new periodic invoice. The system adds one to the **Nbr Created** field in the template record and updates the **Last Used** field with the system date.

A message is displayed indicating that the invoices were created successfully. Click **OK**.

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