

Recurring

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When the Recurring tree option is selected, a list of all active Recurring Lines and Recurring Lines with a future cancellation date for the customer will display in the Active Pane. If a Recurring Line with a future cancellation date is displayed (Cycle End column), once the Cycle End date has passed, this Recurring Line will no longer be displayed in the Active Pane.

In the System column of the Active Pane, if N/A is displayed, this indicates the recurring line was setup at the Site level and is not attached to a System. Typically, recurring lines are setup at the System level.

Colors: Recurring Lines are displayed in different colors depending on the status of the line. Lines displayed in **blue** are active billing lines. Lines displayed in **green** have a future start date and lines displayed in **red** have a future cancellation date.

A Recurring Line record may be opened for viewing by double-clicking on the Recurring Line row in the Active Pane. User permissions are required for this option; if the User does not have the appropriate permissions, a Recurring Line record may not be accessed.

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Right-clicking on the Recurring option will display a list of four options; New Recurring, Create Cycle Invoice Now, Refresh and Include Past Canceled.

- **New Recurring** - A new Recurring Line may be created by selecting this option. User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.
- **Create Cycle Invoice Now** - This option allows the User to generate a Cycle Invoice batch for this one customer. User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out. For more information on cycling a single customer, refer to the Accounts Receivable topic for detailed instructions.
- **Refresh** - Selecting this option will refresh the list displayed in the Active Pane.
- **Include Past Canceled** - Selecting this option will display all active recurring lines along with any previously canceled recurring lines. The canceled lines will be displayed with a red font.

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