Job Recurring

Last Modified on 07/09/2026 11:41 am EDT

Use the Recurring form to create a list of Items to be invoiced to the customer for recurring services.

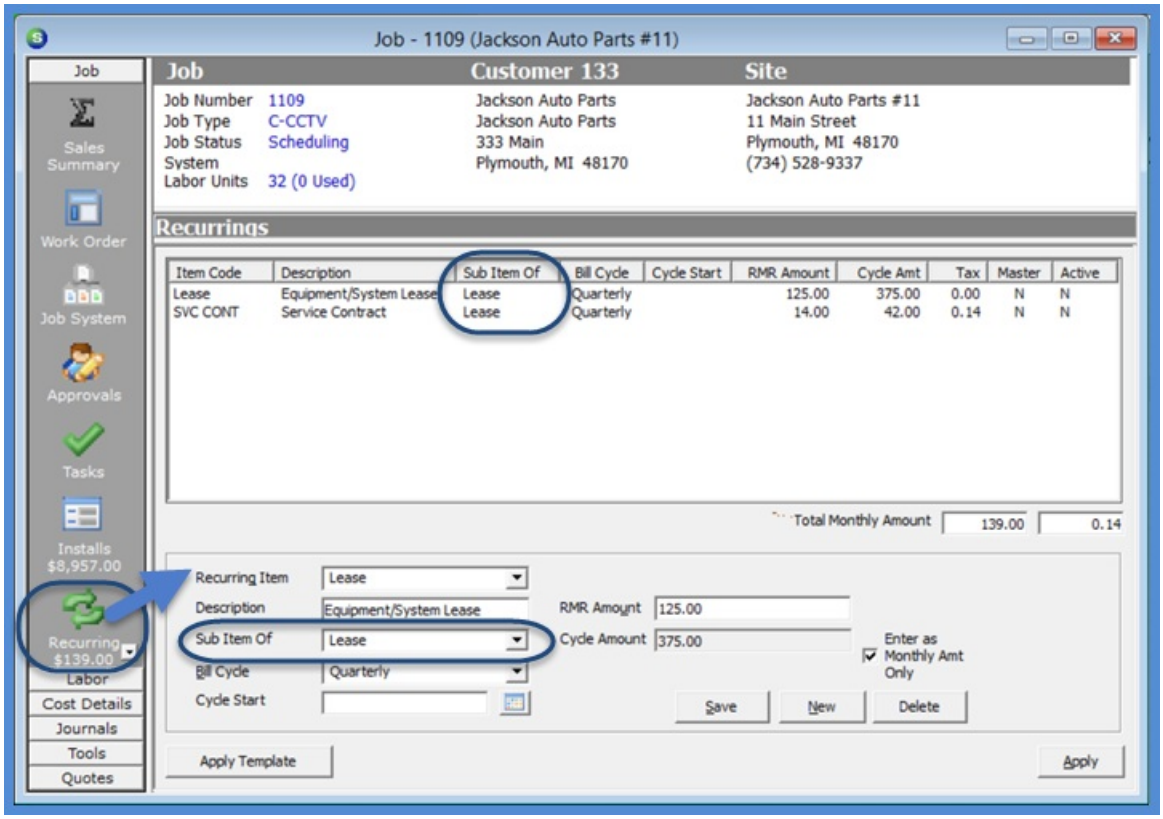
The field Sub Item of is used if recurring lines are to be "rolled-up" on the customer invoice. In the example below, the Sub Item has been set to Lease for all recurring lines. When the customer is invoiced, all recurring lines with the same Sub Item code are grouped together and the services description that displays on the invoice has the description of the Sub Item code.

The Cycle Start date can be entered if it is known when the recurring services will be activated. If a date is entered into this field, this defaults into the Job Invoice as the activation date; this date can be overridden when creating the invoice. Typically this field is left blank until the actual activation date is provided by the installer.

Once saved, Recurring Charges display in the Sales Summary form.

Once Recurring Charges have been invoiced on a job invoice, the recurring line(s) are activated and appear in the Customer Explorer record and begin to bill with the next eligible cycle invoice batch.

Once Recurring Charges have been invoiced through job invoicing, they cannot be re-invoiced. As stated in the previous paragraph, the invoicing of Recurring Charges sets up the Recurring Lines on the customer's account to be billed through the Cycle Invoicing program. If the Recurring Charges were invoiced incorrectly through Job Invoicing, you would create a manual credit memo and apply it to the invoice; you cannot re-invoice those services again through Job Invoicing. To correct invoicing errors for Recurring Charges, you would need to create a Miscellaneous Invoice for the recurring charges.



Click on the link to advance to the next data entry form, Job Materials.