Cycle Invoicing Overview

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Cycle Invoicing is the process of creating invoices for your customers who have active and billable recurring lines set up on their Site or System records. Cycle Invoicing is a five-step process.

- Generate a Cycle
- Review a report to make certain the list of customer recurring lines to be invoiced is accurate
- Post the Cycle / Create Invoices
- Apply any open Credits to the Cycle Invoices (optional)
- Print Cycle Invoices

Step 1 — Generate the Cycle: the software will search for all recurring lines that are ready to be invoiced for the Month/Year selected for billing. A recurring cycle batch file is created containing all billable recurring lines.

Step 2 — Review the Results: review one of the cycle reports which lists all eligible recurring lines to be invoiced. The listing is printable for review of accuracy of rates and the period of time for which the customer is to be invoiced. There are several report formats from which to choose. If the User finds recurring line information that needs to be corrected, the cycle will be deleted, corrections will be made to the recurring lines, and then run the cycle process again.

Step 3 — Post the Cycle Batch: posting the cycle batch will create the invoices that will be applied to the individual customer accounts receivable. Depending on how many invoices are being created, this may take a few minutes to a few hours.

Step 4 — Apply Credits: At the end of the Posting process, a form will be displayed showing any unapplied cash or credit memos for customers contained in the batch being posted. You have the option of applying all credits, selecting only certain credits, or not appling any credits to the Cycle Invoices in the batch being posted.

Step 5 — Print Invoices: all cycle invoices are automatically sent to the Invoice Printing Queue unless the customer has been flagged not to receive a printed cycle invoice (usually customers on auto-pay). Invoice printing is performed from the Accounts Receivable / Print Invoices option. Once the invoices have been printed or emailed, they will be marked with the printing date and be removed from the printing queue.

When your company is using Master Accounts, if recurring services are to be invoiced directly to the

Sub-Account (not the Master Account), those recurring lines will be billed with your regular customers during the cycle invoicing process. If recurring services are invoiced to the Master Account, cycle invoicing is performed separately through Client Management/Master Account Management / Cycle Invoicing.

Related Articles

Cycle Invoice Non-Master Accounts

Cycle Invoice Master Accounts

Cycle Invoice a Single Customer