

Periodic Invoicing

Periodic invoicing allows you to automatically generate pre-set invoices at regular intervals.

This feature may be useful in cases where you are contracted to provide ongoing services that are invoiced at set periods. This might include Security and Fire Safety industries which provide constant monitoring of premises.

This two-part process involves:

- Creating a Periodic Invoice Template and
- AroFlo generating the invoices at set times based on the Periodic Invoice Template.

Create a periodic invoice template

The timing for invoice creation is based on the invoice date and the frequency set in the Periodic Invoice Template.

The Periodic Invoice Template will contain Information such as:

- Client Details
- Location Details
- Invoice Date
- Invoice Frequency
- Customer Order Number
- Client Notes
- Invoice Description
- Invoice Line Items.

To create a Periodic Invoice Template:

View our **Invoicing** product page

On this page:

- [Create a periodic invoice template](#)
- [Manage periodic invoice templates](#)
- [Generate a periodic invoice](#)
- [Auto email on generation](#)
- [Archive a periodic invoice template](#)

Related articles

- [Invoice Schedule of Rates \(SOR\) Items](#)
- [Project Invoicing](#)
- [Track Vehicle Servicing Dates](#)
- [Periodic Task Template Checklists](#)
- [Create a Periodic Task Template](#)

1. Go to **Create > Periodic Invoice**.



You can also create a Periodic Invoice through **Service Track > Invoicing**:

- **Create Periodic Invoices**, or
- **Periodic Invoices > Create Periodic**

2. Set the **Client** to receive the Periodic Invoice
3. Select a **Location** (if applicable)
4. Enter a customer order number in the **Cust ON** field (if applicable)
5. Add **Client Notes** (if applicable)



Client notes are internal and will save in the **Client Message** field found on the Client Card.

6. Set the **Invoice Date** for when the next invoice should be created.



This must be a future date and not today's date

7. Select a **Frequency** for invoice creation.
8. Select one of the following options for the Auto Email on Generation field:
 - a. **No** - Do not auto email the invoice.
 - b. **Yes - Individual** - the system will email this invoice only.
 - c. **Yes - Group By Client** - the system will group this invoice in an email with other periodic invoices that have the same client and also have the 'Group by Client' setting.
9. Add a periodic invoice Description in the **Description** field. This will also appear on your invoice.
10. Add line items as required.



- Refer to [Quote Line Items](#) for more information on adding materials and labour using Add Line Item, Multi-Search and Supplier Catalogues.
- You don't need any line items on the invoice for the invoice to generate; items can be added once the invoice appears in Current Invoices.
- If you've set up [Tracking Centres](#), you can use them on your periodic invoices.

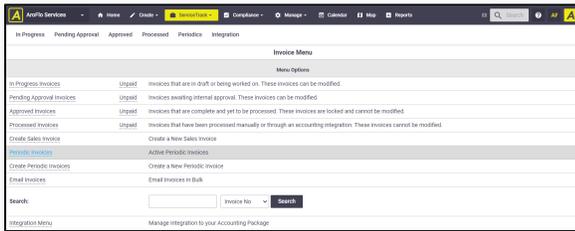


By default, inventory items added to a Periodic Invoice will not affect inventory stock levels. If you would like to track inventory levels for sales invoices, a Site Administrator will need to enable this feature in **Site Admin > Inventory > Track Inventory on Sales Invoices**.

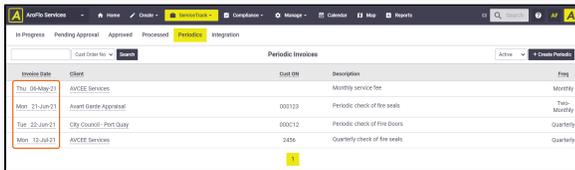
11. Set the **Generated Invoice Status**.
12. Click **Save**. This periodic invoice template will now be visible in the **Periodic Invoice Menu** (see section below).

Manage periodic invoice templates

To view all current Periodic Invoice Templates, go to **Service Track > Invoicing** and click **Periodic Invoices**.



To modify a Periodic Invoice Template, select the **Invoice Date** to open the template, make the required changes and **Save**.

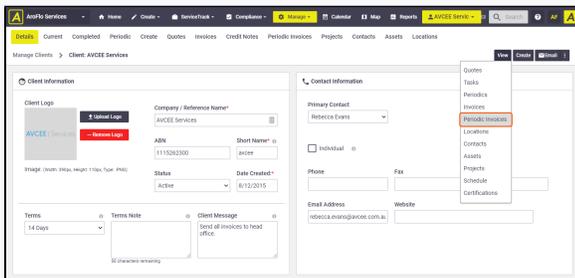


Search or Filter

If there are a number of templates, you can also choose to search by Customer Order No, Client, or Description.

Active and archived templates can also be filtered on the top right of the view.

Periodic invoices can also be viewed from the client list or a client card via the **View** button.



Generate a periodic invoice

Once a template has been created, invoices are generated on the next date listed in the **Invoice Date** column.

Invoice Date	Client	Cost ON	Description	Freq
Thu_08-May-21	AVICE Services		Monthly service fee	Monthly
Mon_21-Jun-21	Avant Gate Appraisal	000123	Periodic check of fire seals	Two-Monthly
Sat_22-Jun-21	City Council-Port Quay	000C12	Periodic check of fire doors	Quarterly
Mon_12-Jul-21	AVICE Services	2456	Quarterly check of fire seals	Quarterly

Once generated, the invoice can be found in the **ServiceTrack > Invoicing** menu under the Status that you set when you created the periodic invoice template (e.g. In Progress, Pending Approval).

Invoice Menu	
Menu Options	
In Progress Invoices	Unpaid Invoices that are in draft or being worked on. These invoices can be modified.
Pending Approval Invoices	Unpaid Invoices awaiting internal approval. These invoices can be modified.
Approved Invoices	Unpaid Invoices that are complete and yet to be processed. These invoices are locked and cannot be modified.
Processed Invoices	Unpaid Invoices that have been processed manually or through an accounting integration. These invoices cannot be modified.
Create Sales Invoice	Create a New Sales Invoice
Periodic Invoices	Active Periodic Invoices
Create Periodic Invoices	Create a New Periodic Invoice
Email Invoices	Email multiple invoices at one time.



You can also force the generation of a Periodic Invoice by clicking **Create > Generate Invoice** within the Periodic Invoice Template

Note: This will also update the next scheduled Invoice date based on the current frequency chosen.

Item/Expense Code	Description	Qty	Rate	Qty	Cost	Margin	Rate	Discount	Total	Tax	Tracking Details
1234567	Check of seals at end of security	1	100.00	1	100.00	0%	100.00	0%	100.00	0%	100.00
1234567	Check of seals in roof space	1	100.00	1	100.00	0%	100.00	0%	100.00	0%	100.00

Generated Invoice Status: **In Progress**

Save

