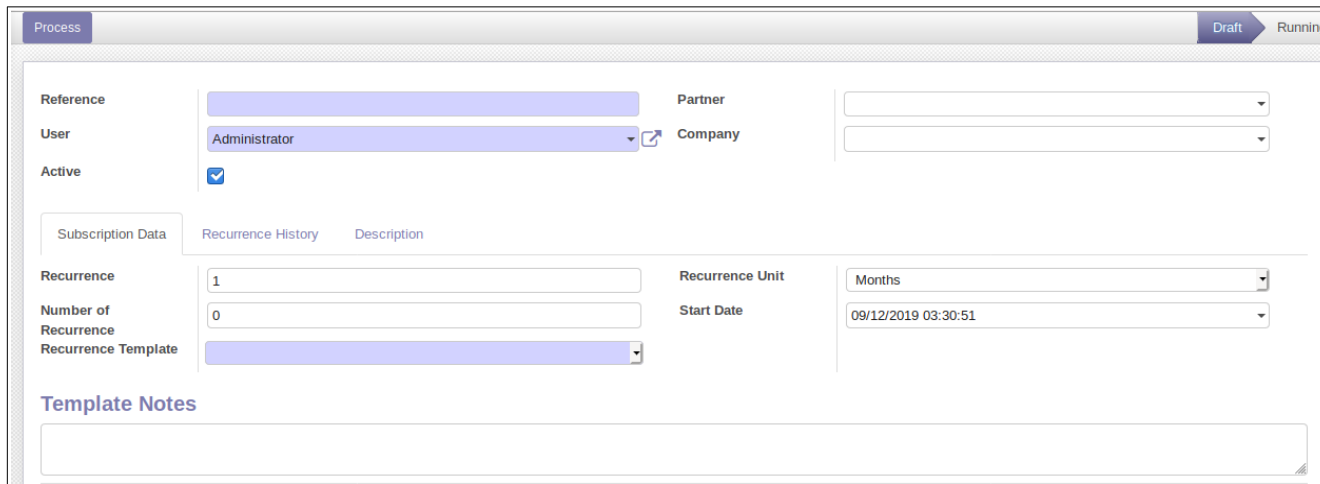


Recurring Transactions

To activate recurring transactions menu:

Activate technical feature (Developer mode) > Accounting > Advisor > Recurring Transactions > Create.



The screenshot shows a web application interface for creating recurring transactions. At the top, there is a 'Process' tab and a 'Draft' button with a right-pointing arrow, followed by the text 'Running'. The form is divided into several sections:

- Reference:** A text input field.
- User:** A dropdown menu with 'Administrator' selected and a small icon to the right.
- Active:** A checked checkbox.
- Partner:** A dropdown menu.
- Company:** A dropdown menu.
- Subscription Data:** A tabbed interface with 'Subscription Data' selected, 'Recurrence History', and 'Description' as other tabs.
- Recurrence:** A text input field containing the value '1'.
- Recurrence Unit:** A dropdown menu with 'Months' selected.
- Number of Recurrence:** A text input field containing the value '0'.
- Start Date:** A dropdown menu with '09/12/2019 03:30:51' selected.
- Recurrence Template:** A dropdown menu.
- Template Notes:** A section with a blue header and a large text area below it.

(1) Recurrence or frequency of recurrence, the value should integer number, for example if you want to set monthly transaction:

Recurrence => 1

Recurrence Unit => Months

(2) Number of recurrence: how many transactions will be generated, for example if you set:

Recurrence => 1

Recurrence Unit => Months

Number of recurrence => 4

Start Date => 01/01/2017

The system will generate a monthly transaction starting from 01/01/2017 until 01/04/2017, so the number of generated transactions are 4.

(3) Recurrence Template, go ahead and select recurring journal entries then a new drop-down list with your previous journal entries (Posted and Unposted)

(4) Recurring Unit, you can select Days, Weeks, Months.

(5) Start Date, when do you want to start the first transaction, please make sure you set future date.

(6) Process or Save, if you want to start the recurring, go ahead and click Process, if you want to review later then hit save.



Note: Remember these are not bills, invoices or expenses, these are all journal entries.