

How to Create a Cycle Invoice from a Customer Account

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If you need to create a Cycle Invoice for a specific customer, you can do this directly from the Customer Account.

Customer Account

Open the Customer Account and Right-click on “Recurring” or on “Invoices” and select “Create Cycle Invoice Now.”

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When the “Cycle Invoice One Customer” screen opens select the Month and Date for the Cycle.

Click on the Green Arrow to populate the list of RMR Items that will be included in the Cycle.

Unselect any RMR Items that should not be included in the Cycle.

Once all RMR Items have been selected, click “Create Cycle.”

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Confirm you are ready to create a Cycle Invoice Batch for this Customer.

Accounts Receivable – Cycle Invoicing

Now go to Cycle Invoicing under the Accounts Receivable Module.

When the Cycle Invoicing screen opens, the Customer Cycle Batch will be listed.

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Double-click on the Batch to open it.

Select the Category and Invoice Description from the drop-down menus.

Change any additional information as needed.

Select “Post.”

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