

## Creating Recurring Invoices

We have the ability to set up recurring invoices in AggieBuy. This is perfectly suited for recurring payments made to a vendor where invoices are not generally submitted, such as lease payments or stipends.

You will create the first invoice and then create the recurring schedule from that invoice. This can be done from a PO based invoice or a non PO based invoice.

**\*\*The supplier invoice number SHOULD NOT be more than 11 digits.**

The recurrences are actually created from the original invoice so if any changes need to be made after the first document you will need to:

- Cancel the recurrence and create a new one OR
- Open the original invoice and make the revisions to that invoice. Those changes will be reflected on recurrences created after the change. Remember that the original invoice is already paid so if you choose this option you want to add notes since what will be seen on the invoice will not match what is in FAMIS. This option eliminates the need to deactivate the occurrence and create a new one.

Create the original invoice

Open the invoice and select Create Recurring Invoice from the available actions

The screenshot displays the 'Buyer Invoice' summary page in the AggieBuy system. The invoice number is 1603465, the supplier invoice number is XT0003888, and the supplier name is Dell. The 'Available Actions' dropdown menu is open, showing options such as 'Assign', 'Assign & Approve/Complete and Match', 'Add Comment', 'Copy to new invoice', 'Create Recurring Invoice', 'Add Notes to History', and 'Assign Contract to All Lines'. A red arrow points to the 'Create Recurring Invoice' option. The main content area shows details for the invoice, including the 'Remit To' and 'Bill To' information, and a table of external attachments.

External Attachments	Size	Date	Remove
File+ F+ confirmati...	153.0 KB	10/2/2019	Remove
Corpus+Chisti+SE...	112.0 KB	10/2/2019	Remove

## Create the recurrence

**Create Recurring Invoice**

Name \* Assign Name

Original Invoice 1603445

Supplier Dell

Description Description is optional

Schedule Type \* Monthly

Every 1 Months

Monthly Schedule \* From Start Date

Time Zone \* CDT/CST - Central Standard Time (US/Cent)

Start Date \* 8/01/2020

End By \* No End Date

End Date \* 07/31/2020 12:00 AM

\* Required

**Note/Attachments**

**Start Date**  
What day do you want the first recurrence to begin? In this example the original invoice is for September rent so it is dated 8/01/20. That means that I want the first recurrence to auto create on 9/01 for October rent

**End By**  
Do you want the recurrence to create indefinitely or give it a first stop date? I only want mine to create for the fiscal year so I stopped it on 7/31 (the invoice that is created on 7/01 will be for August rent so no additional invoices will be created in the fiscal year)

When looking at an invoice you can see that there is a recurring schedule set up and you can view that from the invoice.

If you select “View Schedule” you can find all invoices created from that recurrence by selecting view occurrences

**Schedule Information**

Name Assign Name

Original Invoice 1603445

Supplier Dell

Description Description is optional

Schedule Type Monthly

Time Zone CDT/CST - Central Standard Time (US/Central)

Start Date 8/1/2020 12:00:00 AM

End Date 7/31/2021 12:00:00 AM

Next Scheduled Date no value

Remaining Pending

[View Occurrences](#)

You can also see the recurring invoices from the AP icon.

Orders ▸ Search ▸ Search Documents ▸ Document Search

< Back to Edit Search | Start New Search

Showing 1 - 1 of 1 Results

Results Per Page 20

Search Details ?

Search Terms

Invoice No. 1603465 Supplier Invoice I XT0003888

Accounts Payable Type an Invoice Number...

- Invoices ▸ AP Home
- Receipts
- Approvals
- AP Administration
- Reports

View Draft Invoices

Search for Invoices

Search AP Requests

Create New Invoice, Credit Memo...

View Recurring Invoice Schedules

Refine Search Results ?

Type

Invoices

Home Shop Orders Contracts Accounts Payable Suppliers Sourcing Reporting Administrator Setup

Accounts Payable ▸ Invoices ▸ View Recurring Invoice Schedules ▸ View Recurring Invoice Schedules

### Recurring Invoice Schedules

Filter

Supplier: Type to filter...

Scheduled By: Any Me Pick...

Status: Active

Apply

Page 1 of 2 1-20 of 26 Results 20 Per Page

Name	Supplier	Original Invoice	Scheduled By	Start Date	Next Scheduled Date	End Date	Remaining	Actions
AB0463726-FY20	SLS DEEP ELLUM LP	✓ 80571954	Tammy Stolley	9/1/2019 12:00 AM -05:00	2/1/2020 12:00 AM -06:00	7/31/2020 12:00 AM -05:00	6	Actions
AB0321314-FY20	MILICAN RESERVE LAND CONSERVANCY	✓ 81118811	Tammy Stolley	9/1/2019 12:00 AM -05:00	2/1/2020 12:00 AM -06:00	8/5/2020 12:00 AM -05:00	7	Actions
AB0134423-FY20	CPT ARLINGTON HIGHLANDS 1 LP	✓ 81866345	Tammy Stolley	9/1/2019 12:00 AM -05:00	2/1/2020 12:00 AM -06:00	7/31/2020 12:00 AM -05:00	6	Actions
AB0148113-FY20	TEXAS NAME MERCANTILE INVESTMENT LLC	✓ 81867273	Tammy Stolley	9/1/2019 12:00 AM -05:00	2/1/2020 12:00 AM -06:00	7/31/2020 12:00 AM -05:00	6	Actions
AB0324-FY20						7/31/2020 12:00 AM -05:00	6	Actions
AB0315-FY20						7/31/2020 12:00 AM -05:00	6	Actions
AB0406-FY20						7/31/2020 12:00 AM -05:00	6	Actions
AB0417-FY20						7/31/2020 12:00 AM -05:00	6	Actions
AB040991-FY20	DE LAGE LANDEN FINANCIAL SERVICES	✓ 81891695	Tammy Stolley	9/1/2019 12:00 AM -05:00	2/1/2020 12:00 AM -06:00	7/31/2020 12:00 AM -05:00	6	Actions

You can see how many recurring invoices are going to be created on each schedule.

You can also edit a schedule or stop the future recurrences from being created

**Search Details**

**Search Terms**  
Original Recurring Invoice Number  
80571954

**Filtered by**  
Type: Invoices  
Date Range: All Dates  
[Save New Search](#) [Export Search](#)

**Refine Search Results**

**Type**  
Invoices

**Date Range**  
All Dates

**Approved By**  
Cindy Glover (4)  
Florence Bourner (2)  
Tammy Stille (1)  
Sandy Dagestain (1) [more]

**Business Unit**  
23-Texas A&M Health Science Center (23) (6)

**Custom Fields**  
Add to Asset Number  
Buyer  
Bypass Invoice Allocator  
Check Date (MM/DD/YYYY) [more]

**Department**  
73-4130 (73-4130) (6)

Showing 1 - 6 of 6 Results

All Dates

Results Per Page: 500

Sort by: Best match

Invoice No.	Supplier Invoice No.	Supplier Name	PO No.	Invoice Date/Time	Other Detail	Invoice Total
88329029	AB0463726-5	SLS DEEP ELLUM LP	AB0463726	Created: 1/1/2020 12:11 AM Due: 1/26/2020 Discount:	Source: Recurring Type: PO Invoice Pay: Payable Status:	1,400.00 USD
87122070	AB0463726-4	SLS DEEP ELLUM LP	AB0463726	Created: 12/1/2019 12:19 AM Due: 12/26/2019 Discount:	Source: Recurring Type: PO Invoice Pay: Paid Status:	1,400.00 USD
85768681	AB0463726-3	SLS DEEP ELLUM LP	AB0463726	Created: 11/1/2019 1:16 AM Due: 11/26/2019 Discount:	Source: Recurring Type: PO Invoice Pay: Paid Status:	1,400.00 USD
84214194	AB0463726-2	SLS DEEP ELLUM LP	AB0463726	Created: 10/1/2019 1:18 AM Due: 10/26/2019 Discount:	Source: Recurring Type: PO Invoice Pay: Paid Status:	1,400.00 USD
83480517	AB0463726-1	SLS DEEP ELLUM LP	AB0463726	Created: 9/15/2019 1:18 AM Due: 9/26/2019 Discount:	Source: Recurring Type: PO Invoice Pay: Paid Status:	1,400.00 USD
80571954	AB0463726	SLS DEEP ELLUM LP	AB0463726	Created: 7/11/2019 2:44 PM Due: 8/26/2019	Source: Manual Type: PO Invoice Pay: Payable Status:	1,400.00 USD

Results Per Page: 5

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When you select View Occurrences it will show you every invoice created from the recurring invoice schedule that was created.

The supplier invoice number on the recurrences will be the supplier invoice number from the original invoice with - # (this is why the invoice number on the original should NOT be longer than 11 digits. We are only allowed 14 characters in FAMIS so if you set up 12 months then you will need three blank spaces \*-10, \*-11, etc.)

For this example, the first payment was supplier invoice number AB0463726, the second payment first auto created invoice was AB0463726-1, the third payment, second auto created invoice was AB0463726-2