

# Recurring Group

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# Introduction

# Introduction

Recurring Group window is the master window which is used for maintain the Recurring Group data.

Tab

Tab

# Recurring Group

The screenshot shows a software interface with a tabbed menu at the top. The active tab is 'Recurring Group: 1000000 R...'. Below the menu is a toolbar with various icons. The main form area is titled 'Recurring Group' and contains the following fields:

- Client\***: A text box containing 'Sandbox'.
- Organization\***: A text box containing '\*'.
- Search Key**: A text box containing '1000000'.
- Name\***: A text box containing 'Recurring Run'.
- Description**: An empty text box.
- Comment/Help**: A large empty text area.
- Active**: A checkbox that is checked.

## Critical Fields :

1. Search Key : Used to maintain the search key
2. Name : Used to maintain the Recurring name
3. Description : Used to maintain the extra data about the Recurring Group
4. Comment/Help : Used to maintain the extra data about the Recurring Group

## Critical & onetime setup fields :

1. Organization : This Field is used to select the organization

## Non-Critical Fields :

## **Zoom condition's :**

1.Invoice Run Config

# Document Actions

# Document Actions

## **Save :**

1.System will check the all mandatory fields

## **Delete :**

1.System will delete the Document and its history details

## **Document action prepare :**

1.System will check the period details and master data's checking

## **Document action complete :**

1.Once document action is complete ,all fields are update in read only

## **Document action void/reverse correct actual :**

1.Void- system will reverse all the transaction data's and change the document status to Void

## **Document action close :**

1.system will check whether all the activity for the document is completed and change the Document status to close.



# Process and Forms

# Generate Invoice Run

Home (65)

Summary

Generate Invoice Run x

Invoice Run Config: Sales I... x

⌵

📄

Do you want to start the Process?

Organization \*

▼

Recurring Group \*

Recurring Run

▼

DocumentAction \*

Prepare

▼

☒ Sales Transaction

Document Type

▼

Date Invoiced \*

📅

☐ Run as Job

Saved Parameters

▼

💾

🗑️

✔ OK

✖ Cancel

Invoice Run

1/2

Data requeried

Client\*

Sandbox

Organization\*

Manufacturing Discrete

Name\*

Invoice Run for -> Recurring Run for 15/09/2023

Transaction Date\*

19/09/2023

Recurring Group\*

Recurring Run

User/Contact\*

Prasanth P

☒ Active

Invoice Run Detail

3 Records

	Organization	Invoice Run Products	Order	Sales Order Line	Product
<input checked="" type="checkbox"/>	Manufacturing Discrete	1000003	50373_15/09/2023	50373_15/09/2023_10_L...	Lathe (HMS) Machine_La...
<input type="checkbox"/>	Manufacturing Discrete	1000003	50367_15/09/2023	50367_15/09/2023_10_L...	Lathe (HMS) Machine_La...
<input type="checkbox"/>	Manufacturing Discrete	1000002	50373_15/09/2023	50373_15/09/2023_30_P...	Paint gun_Paint gun

Home (65) Summary Invoice Run Config: Sales I... x Invoice Run: Invoice Run fo... x

Invoice Run > Invoice Run Detail 3/3

<u>Client</u> *	Sandbox	<u>Organization</u> *	Manufacturing Discrete
<u>Invoice Run</u>	Invoice Run for -> Recurring Run for 15/09/2023	<u>Invoice Run Products</u> *	1000002
<u>Order</u> *	50373_15/09/2023	<u>Sales Order Line</u> *	50373_15/09/2023_30_Paint gun-Paint gun
<u>Product</u>	Paint gun_Paint gun	<u>Charge</u>	
<u>Invoice</u> *	T-20_15/09/2023_3540.00	<input type="checkbox"/> Generate Auto Shipment	
Document Status*	In Progress	<input checked="" type="checkbox"/> Sales Transaction	
Quantity Invoiced	1	Unit Price	
Amount*	3,540.00		
<input checked="" type="checkbox"/> Active			

## Process Use :

This process is used to auto generate the invoice documents based on the recurring group. This generated documents will be visible in Invoice Run Read Only Window.

## Parameters :

1. Organization : Used to filter the organization name
2. Recurring Group : Used to select the Group name for filter option
3. Document Action : Used to mention the document action for the generated invoice document
4. Document Type : Used to mention the invoice generating document type
5. Date Invoiced : Used to mention the invoice date
6. Sales Transaction : Used to mention the generated invoice will be sales or purchase document.

# Videos