

Recurring Group

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Introduction

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 browser-like tab bar at the top containing 'Home (65)', 'Summary', 'Generate Invoice Run', 'Recurring Group: 1000000 R...', and 'Invoice Run Config: Sales I...'. Below the tab bar is a toolbar with various icons. The main content area is titled 'Recurring Group' and contains a form with the following fields:

- Client***: Text box containing 'Sandbox'
- Organization***: Text box containing '*'
- Search Key**: Text box containing '1000000'
- Name***: Text box containing 'Recurring Run'
- Description**: Empty text box
- Comment/Help**: Empty text area
- Active**: Checked checkbox

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 * ▼

DocumentAction * ▼

Sales Transaction

Document Type ▼

Date Invoiced * 

Run as Job

Saved Parameters ▼  



Invoice Run

Data requiered

Sandbox
 Manufacturing Discrete
 Invoice Run for -> Recurring Run for 15/09/2023
 19/09/2023
 Recurring Run
 Prasanth P
 Active

Invoice Run Detail



3 Records

<input type="checkbox"/>	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

Client*	Sandbox	Organization*	Manufacturing Discrete
Invoice Run	Invoice Run for -> Recurring Run for 15/09/2023	Invoice Run Products*	1000002
Order*	50373_15/09/2023	Sales Order Line*	50373_15/09/2023_30_Paint gun-Paint gun
Product	Paint gun_Paint gun	Charge	
Invoice*	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