

# Automated Recurring Invoices

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Recurring Invoicing is the process of creating invoices for your customers who have active and billable RMR records set up on their Site or System records. Recurring Invoicing may be automated, or your company may generate recurring invoices at the time you prefer.

To enable the automated Recurring Invoicing, this is configured in Setup > Utilities > Automation. If the toggle button for RMR Generation and/or Master RMR Generation are set to On, based upon the preference settings, invoices will automatically be generated.

**Automation** Save

Email Summary  OFF ?

Forte Payment Submit  OFF ?

Forte Funding Run Now

Expiring Credit Card Summary  OFF ?

Invoice/Credit Delivery  OFF ?

RMR Invoice Delivery  OFF ?

**RMR Generation**  ON ?

Run on the 1 st day of the month

RMR Next Invoice for Current Month

Invoice Date is the 1 st day of Current Month

Next RMR Run Date: 04/01/2022  
RMR Next Invoice Date: 04/01/2022  
Invoice Date: 04/01/2022  
Next CC/leCheck Funding Date: 04/xx/2022

Master RMR Generation  OFF ?

Statement Generation  OFF ?

If your company prefers to create the Recurring Invoices at will, this may be accomplished from the main application - Accounts Receivable > Invoices > Recurring Invoices [button on the page].

## RMR Generation Options

- **RMR Generation** – If this toggle button is set to On, recurring invoices will automatically be generated based on the next three options. If this option is set to Off, your company will need to manually create the recurring invoices.
- **Run on the ? day of the month** – Enter the day of the month on which the recurring invoice process will run.
- **RMR Next Invoice For** – Enter the next month the recurring invoice process will run.
- **Invoice Date** – Enter the day of the of the month that will be used for the invoice date.

# Automation

Save

RMR Generation  ON ?

Run on the  st day of the month

RMR Next Invoice for

Invoice Date is the  st day of

Next RMR Run Date: 04/01/2022

RMR Next Invoice Date: 04/01/2022

Invoice Date: 04/01/2022

Next CC/eCheck Funding Date: 04/xx/2022

Master RMR Generation  OFF ?

*[Faded text area containing additional configuration options for Master RMR Generation]*