Recurring Transactions

You can have SIMMS automatically generate a new transaction based on an existing transaction. This is useful if you need to create the same transaction multiple times. For example, suppose you invoice a client every month for the same item, You could create an invoice and schedule SIMMS to automatically generate the same invoice every month.

You can create recurring transactions for sales orders, invoices, and purchase orders.

Schedule a Recurring Transaction

1. Create your transaction (either a sales order, invoice, or purchase order) as you normally would.

2. Before you save the transaction, click the **Scheduler** tab and do one of the following steps:

    - To have your transaction recur only once, in the **Recurring Type** list, select **One time**. And then in the available fields specify the date and time you want SIMMS to generate your new transaction.

    - To have your transaction recur more than once, in the **Recurring Type** list, select **Recurring**. And then in the available fields specify the frequency and duration you want SIMMS to generate your new transactions.

3. Click the **Save** icon.

View a Transaction that is Scheduled to Recur

You can view all the transactions that you originally scheduled to recur in the Recurring Transaction Manager.

- To view a transaction that has been scheduled to recur, open the **Administration** menu and then click **Recurring Transaction Manager**.

Stop a Recurring Transaction

You can manually stop a transaction from recurring at anytime.

1. Open the **Administration** menu and then click **Recurring Transaction Manager**.

2. For the transaction you want to stop recurring, in the **Recurring** column, click the double arrow icon.

   The Scheduler Info window opens.

3. In the **Recurring Type** list, select **No Recurring**.

4. Close the Scheduler Info window. A message appears asking you to confirm that you want to stop the recurrence of your transaction. Click **Yes**.

View Transaction that have Recurred

Transactions that have recurred are those duplicate transactions SIMMS generates. These transactions are based on the original transaction you scheduled to recur.

• To view the sales orders SIMMS has generated, open the Sales menu, and then click Recurring SO Management Queue

• To view the invoices that SIMMS has generated, open the Sales menu, and then click Recurring Invoice Management Queue.

• To view the purchase orders has generated, open the Purchasing menu, and then click Recurring Invoice Management Queue.