

Service periods on invoices is now available when “Split Invoice PDF” is enabled.

1. Go To Billing -> Billing Setup -> Inv & Credit Note Setup
2. Scroll down to invoice settings and enable “Split Invoice PDF”

Invoice Settings

Show in Customer Portal

ON

Invoice Message

Please use your account code {{{account_code}}} as reference when making payment
Thank you for your business.
You can reach our accounts department on {{{sending_company_tel}}} or via email at {{{sending_company_email}}}
Message to display on the bottom of all invoices. Embed fields using {{{account_code}}} or {{{document_number}}}

Send new invoices by Email

ON

Split Invoice PDF

Yes

Send Invoice PDF Split By Recurring and Non Recurring Products

Invoice Email Message

Dear {{{customer_name}}}
Please find attached Invoice {{{document_number}}} for {{{document_amount}}}
Email content to send to customers when sending their invoices. Embed fields using {{{customer_name}}}, {{{account_code}}}, {{{document_amount}}}, {{{due_date}}}, {{{document_date}}}, {{{document_number}}}, {{{document_url}}}, {{{pay_method}}}, {{{client_portal_url}}}, {{{sending_company_name}}}, {{{sending_company_tel}}}, {{{sending_company_email}}}, {{{payment_message}}}

3. Go To Billing -> Billing Setup -> Billing Setup

Billing Settings

Currency Symbol	R - SA Rand	
	Currency symbol to use when displaying amounts	
Base Exchange Rate	ZAR	
	Default exchange rate to use when calculating exchange rates	
Financial Year End	February	
	The month the financial year ends on	
Month End Cutoff	28th	
	Last day of the month to include data topup and phone call costs. Costs incurred after this date rolls over to the next month.	
Last Finalized Financial Period	May 2017	
	Last finalized financial period. New transactions will not be allowed for this period or prior	
Current Billing Period	July 2017	
	Current period to generate recurring billing and debit run batches for	
Current Service Period	1 Month After Billing Period	
	Service period the invoice is for	
Current Billing Range	2017-06-29	Until 2017-07-28

4. Choose how your service period should be linked to your billing period.

- 1 Month After Billing Period
- 2 Months After Billing Period
- Same Month As Billing Period
- 1 Month Before Billing Period

Current Billing Period

Current period to generate recurring billing and debit run batches for

Current Service Period

- 1 Month After Billing Period
- 1 Month After Billing Period
- 2 Months After Billing Period
- Same Month As Billing Period
- 1 Month Before Billing Period

5. Once the invoice has been generated as a final invoice, then the service period will show on the invoice PDF:

TAX INVOICE



INV NUMBER: INV0000288
 ACCOUNT CODE: TRA002
SERVICE PERIOD: August 2017
 INV DATE: 2017-07-27
 DUE DATE: 2017-08-01

FROM: DASHTEL DIV & TRNG CO
 VAT NO: (CHARTER)
 PORTAL ADDRESS: P.O. Box 1046
 Jorale
 4000
 TO: Training 3
 PORTAL ADDRESS: PORTAL ADDRESS
 PHYSICAL ADDRESS: PHYSICAL ADDRESS

Non Recurring

Type	Description	Qty	Incl Price	Disc %	Incl Total	VAT	Excl Total
Call Outs	Standard Call Out	1.00	R 350.00	0.00%	R 350.00	R 42.98	R 307.02
Total Exclusive:							R 307.02

Recurring

Type	Description	Qty	Incl Price	Disc %	Incl Total	VAT	Excl Total
BANDWIDTH	1 3M/3M - train.train@train.com	1.0	R 23.00	0.00%	R 23.00	R 2.82	R 20.18
Total Exclusive:							R 20.18

						Total Exclusive:	R 327.19
						Total VAT:	R 45.81
						Total Inclusive:	R 373.00

See more on recurring and non recurring products on invoices:

<https://support.herotill.com/split-recurring-non-recurring-products-invoices/>

Note:

Service periods are only for recurring billing. This means that you can still make invoices manually that will not show the service period on them.

Invoices generated from Job Cards in the Lead to Receipt Workflow will show the service period as the same month as the install date.

The install date is the date that the install was scheduled for on the Job Card.