

Recurring and non recurring products can be split on the invoice PDF.

## How to enable the invoice PDF to be split into recurring and non recurring:

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

**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

**Split Invoice PDF**

Send Invoice PDF Split By Recurring and Non Recurring Products

**Invoice Email Message**  
 Dear {{{customer\_name}}}  
 Please find attached Invoice <a href="{{document\_url}}>{{{document\_number}}}</a> 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. Make sure your products has the correct product types and that your product types has "Recurring" enabled or disabled according to your needs. Go to Billing -> Products -> Product Types.

Product Types

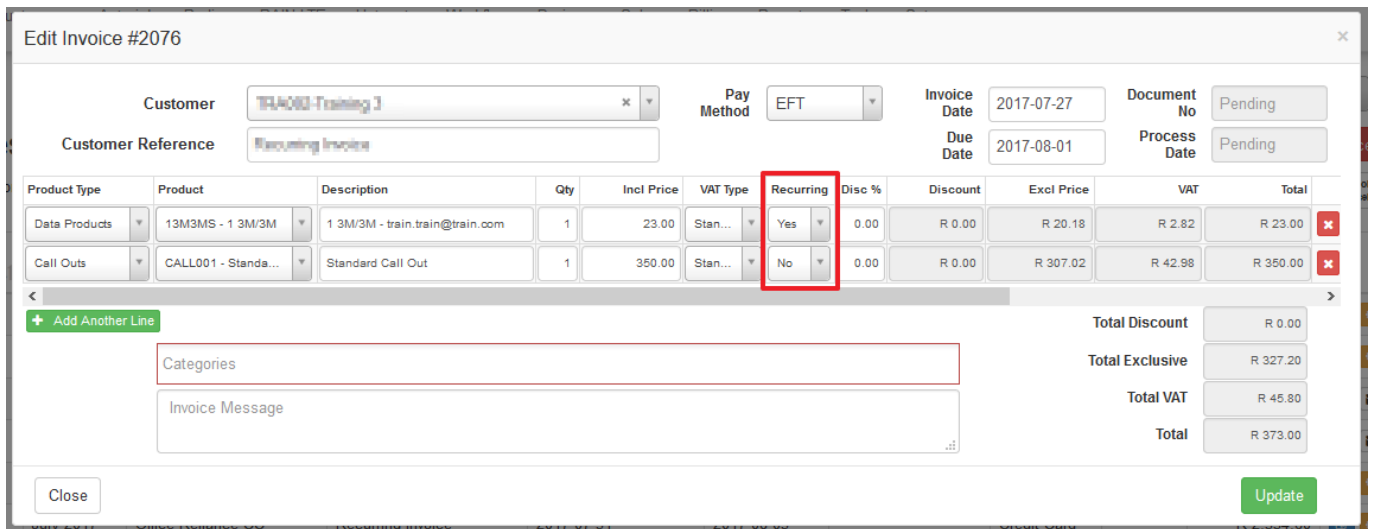
Normal + Add Product Type Refresh

Show 15 Rows Search:

Product Type	Description	Recurring	SageOne Category	Integration ID	Category Creation	
BANDWIDTH	Data Products	Yes	BANDWIDTH	320980	2015-11-18T11:34:28.377	
Call Outs			Call Outs	374329	2016-04-04T22:49:53.797	

4. The invoice lines will populate the “Recurring” setting as it is set up on the product selected on the invoice line.

The “Recurring” setting can still be edited on each invoice line and if it is changed by editing the invoice, it will not have an effect on the actual product types and will only effect that particular invoice’s PDF.



The screenshot shows the 'Edit Invoice #2076' window. At the top, there are fields for Customer (TRAINING-Training 3), Pay Method (EFT), Invoice Date (2017-07-27), Document No (Pending), Customer Reference (Recurring Invoice), Due Date (2017-08-01), and Process Date (Pending). Below this is a table of invoice lines:

Product Type	Product	Description	Qty	Incl Price	VAT Type	Recurring	Disc %	Discount	Excl Price	VAT	Total
Data Products	13M3MS - 1 3M/3M	1 3M/3M - train.train@train.com	1	23.00	Stan...	Yes	0.00	R 0.00	R 20.18	R 2.82	R 23.00
Call Outs	CALL001 - Standa...	Standard Call Out	1	350.00	Stan...	No	0.00	R 0.00	R 307.02	R 42.98	R 350.00

Below the table, there is a '+ Add Another Line' button, a 'Categories' input field, and an 'Invoice Message' text area. On the right side, there is a summary section:

Total Discount	R 0.00
Total Exclusive	R 327.20
Total VAT	R 45.80
<b>Total</b>	<b>R 373.00</b>

At the bottom, there are 'Close' and 'Update' buttons.

5. When the invoice gets generated as a final invoice, then you can see that the invoice PDF has split the lines into recurring and non recurring.



## TAX INVOICE

**INV NUMBER:** INV000288  
**ACCOUNT CODE:** TRA002  
**SERVICE PERIOD:** August 2017  
**INV DATE:** 2017-07-27  
**DUE DATE:** 2017-08-01

<b>FROM</b>	<b>TO</b>
DATAFLO DIV-B TRAFIC	Training 2
NETNO: (CHARTER)	
<b>POSTAL ADDRESS:</b>	<b>POSTAL ADDRESS:</b>
P.O. Box 1049	
Orange	
6051	
<b>PHYSICAL ADDRESS:</b>	<b>PHYSICAL ADDRESS:</b>
121 BROAD ST	
Orange	
6051	

### 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
						<b>Total Exclusive:</b>	<b>R 307.02</b>

### 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
						<b>Total Exclusive:</b>	<b>R 20.18</b>

						<b>Total Exclusive:</b>	<b>R 327.19</b>
						<b>Total VAT:</b>	<b>R 45.81</b>
						<b>Total Inclusive:</b>	<b>R 373.00</b>