

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 {{{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. 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

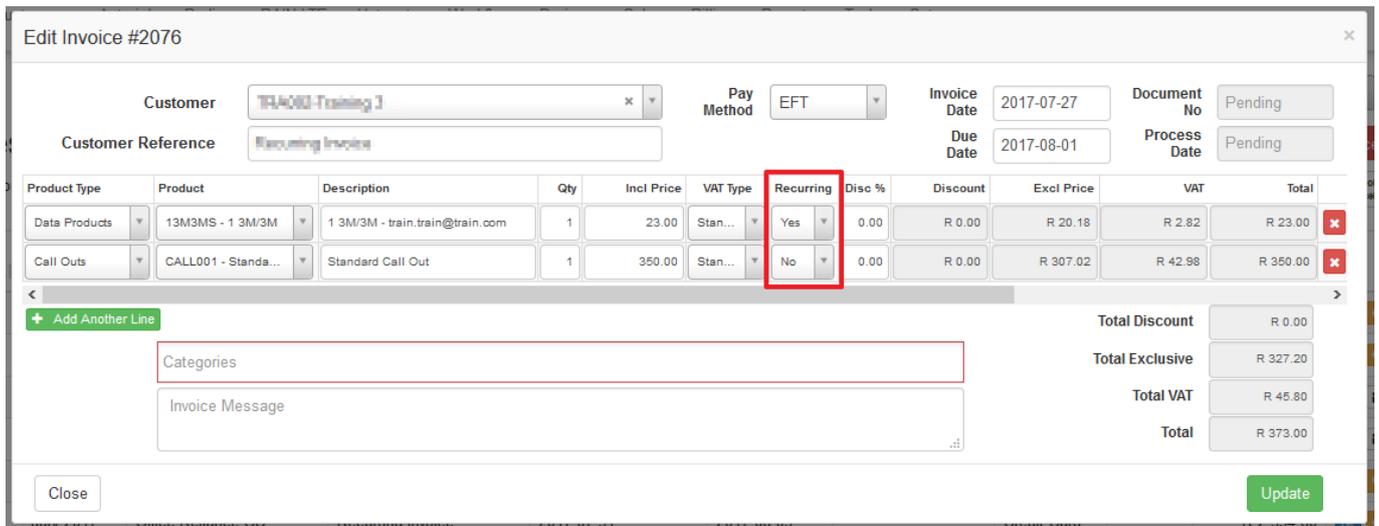
Normal + Add Product Type Refresh

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.



Customer: TRAINING-Training 3
Pay Method: EFT
Invoice Date: 2017-07-27
Document No: Pending
Customer Reference: Recurring Invoice
Due Date: 2017-08-01
Process Date: Pending

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

+ Add Another Line

Categories
Invoice Message

Total Discount: R 0.00
Total Exclusive: R 327.20
Total VAT: R 45.80
Total: R 373.00

Close Update

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

FROM	TO
DATAFLO DIV-B TRAFIC	Training 2
NETNO: (046754)	
POSTAL ADDRESS:	POSTAL ADDRESS:
P.O. Box 1049	
Orange	
6001	
PHYSICAL ADDRESS:	PHYSICAL ADDRESS:
121 BROAD ST	
Orange	
6001	

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