

Recurring Billing

Last Modified on 03/21/2025 4:43 pm EDT

Recurring Billing enables a fixed fee to be automatically charged to a customer's account on a regular schedule—whether monthly, quarterly, semi-annually, or annually—for services like meter reading, monitor fees, or appliance maintenance contracts.

For Recurring Billing processing see [Billing Entry](#).

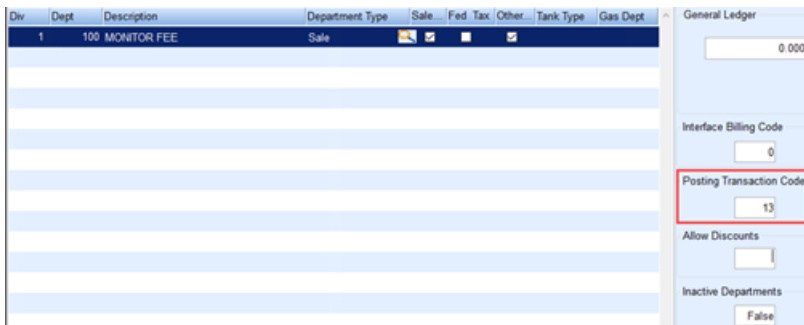
Maintenance Table Setup

For Recurring Billing to be processed, the following maintenance tables will need to be set up prior to billing.

1. Department
2. Price
3. Recurring Cycle Code

Department

Each billable item must be added to the *Department* table. Navigate to *Main Menu / Supervisor Menu / Maintenance Menu / Maintenance Tables / Department*.



Div	Dept	Description	Department Type	Sale	Fed Tax	Other	Tank Type	Gas Dept
1	100	MONITOR FEE	Sale					

General Ledger

0.0000

Interface Billing Code
0

Posting Transaction Code
13

Allow Discounts

Inactive Departments
False

1. Select *Edit/Create* for *Mode* and press **Continue**.
2. To add a new line item, select **Create** at the bottom of the screen or press **F4** to insert an empty line.
3. Enter *Division 1* and press **Tab** to the *Description* field.
4. Enter a description of the fee.
5. Select *Sale* as the *Department Type* or leave blank.
6. Select the applicable tax columns for *Sales Tax*, *Federal Tax*, or *Other* (City, County taxes).
7. Enter *13* for the *Posting Transaction Code*.
8. Once all departments have been added, return to the *Maintenance Mode and Scope* window, select *Copy* and the *Division* ranges to copy in the *To Min* and *To Max* fields from the *Division 1* entry and press **Continue**.

4 Maintenance Mode and Scope

1. Mode
 View
 Edit/Create
 Copy

2. Scope
 One Division
 All Divisions

3. Division
 From
 To Min
 To Max

Set Mode, Scope, and Division, then Press Continue. Press Cancel to Abort.

Price

A Price Code must be added for each billable item.

Example: A Price Code for a Monitor Fee will need to be added if customers are to be billed for monitor fees. One Price Code can have multiple tiers if applicable. Using the example below, the fees are structured for Annual, Semi Annual, and Quarterly.

Division	Price Code	Price Description	Price Type	Avgd Price Y/N	Rack Code	Rack Price Description
1	67	MONITOR FEE	0	No	0	

Pricing Tiers	Starting Gallons	Ending Gallons	Low Cap	High Cap	Margin
A Tier 100.0000	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0.0000"/>	<input type="text" value="0.0000"/>	<input type="text" value="0.0000"/>
B Tier 50.0000	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0.0000"/>	<input type="text" value="0.0000"/>	<input type="text" value="0.0000"/>
C Tier 25.0000	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0.0000"/>	<input type="text" value="0.0000"/>	<input type="text" value="0.0000"/>
D Tier 0.0000	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0.0000"/>	<input type="text" value="0.0000"/>	<input type="text" value="0.0000"/>
E Tier 0.0000	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0.0000"/>	<input type="text" value="0.0000"/>	<input type="text" value="0.0000"/>

1. Navigate to *Main Menu / Supervisor Menu / Maintenance Menu / Maintenance Tables / Price* and select *Edit/Create* for Mode.
2. Select **Create** or Press **F4** to insert an empty line.
3. In the *Division* column, Enter **1** and press **Tab**.
4. Enter a *Description* and press **Tab**.
5. In the lower section under *Pricing Tiers*, enter the charge price for the fee. There can be multiple tiers if the fee has multiple values.
6. Repeat for each fee. If Division 1 pricing applies to all divisions, the copy tool can be utilized. If pricing is different for each division, it is recommended to add the prices codes manually for each location.

Recurring Cycle Code

Recurring billing is processed based on cycle codes. It is recommended to have different cycle codes for each billing situation such as Monthly, Quarterly, Semi Annual, etc.

Division	Cycle Code	Description
1	15	ANNUAL MONITOR FEE CUSTOMER
1	16	SEMI ANNUAL MONITOR FEE CUSTOMER
1	17	MONTHLY SERVICE CONTRACT CUSTOMER

1. Navigate to *Main Menu / Supervisor Menu / Maintenance Menu / Maintenance Tables / Recurring Cycle Code*. For *Mode*, select *Edit/Create* and press **Continue**.
 2. Enter *Division 1* and press **Tab**.
 3. Enter a *Cycle Code* of your choosing and press **Tab**.
 4. Enter a *Description*.
 5. Repeat for each Cycle Code and **Save** when finished.
 6. If Division 1 Recurring Cycle Codes apply to all divisions, the copy tool can be utilized. Otherwise, create an entry for each cycle code per division.
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