Recurring Billing

Last Modified on 07/10/2025 3:35 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

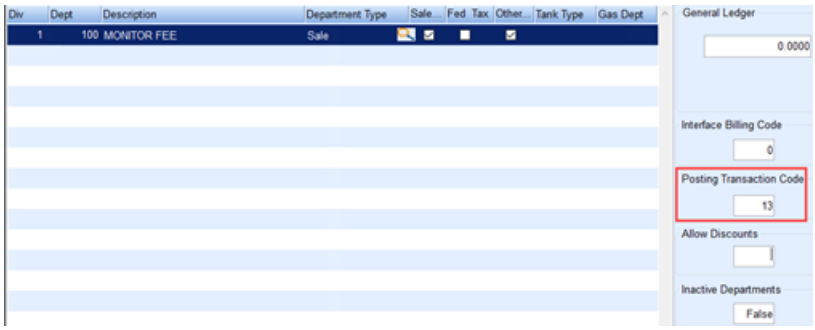
For Recurring Billing to be processed, the following maintenance tables will need to be set up prior to billing.

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*.

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**.

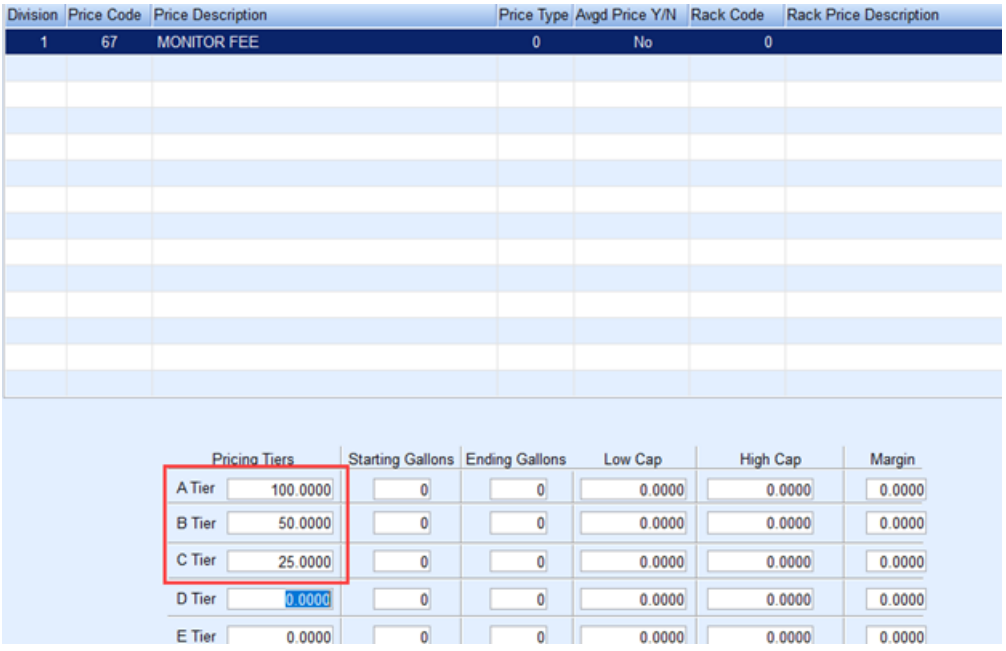


Price

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.

1. Navigate to *Main Menu / Supervisor Menu / Maintenance Menu / Maintenance Tables / Price* and select *Edit/Create* for *Mode* then **Continue**.
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.

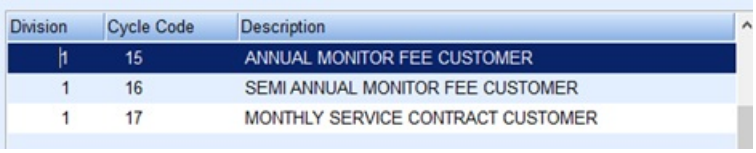


6. Repeat for each fee. If Division 1 pricing applies to all divisions, the copy tool can be utilized. If pricing is different for each division, it is recommended to add the prices codes manually for each location.

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. Select **Create** or Press **F4** to insert an empty line.
3. Enter *Division 1* and press **Tab**.
4. Enter a *Cycle Code* of your choosing and press **Tab**.
5. Enter a *Description*.
6. Repeat for each Cycle Code and **Save** when finished.
7. 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.