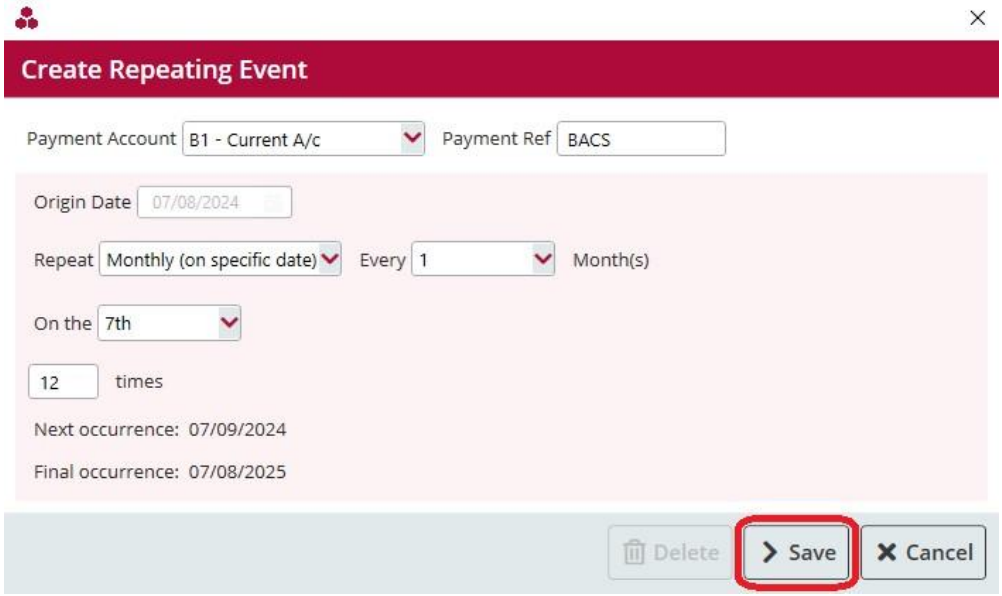
Setting up Repeat Processes

TOTAL2 has the ability to repeat invoices, transfers and payments on a regular basis. This can be used to semi-automate input for recurring records.

Repeat Invoices

You can set up repeats for existing or new invoices.

1. Enter an existing invoice, or alternatively commit all lines for a new invoice, and click **Repeat Invoice**
    a. This is will open a window where the details of the repeating invoice can be set



        i. Select a **Payment Account** (can be Not Paid)
        ii. Origin date will be the original invoice date
        iii. Select when you want the invoice to repeat (Weekly, Monthly or Annually)
        iv. Select the number of times the invoice will repeat
    b. **Next occurrence** and **Final occurrence** indicate when the first and last instance of the repeated invoice are marked to be added on
    c. Click **Save** to save the repeat
2. Upon saving, a repeat icon will appear next to the invoice header

Invoices

1st #	Date	Reference	Type	Net £	VAT £	VAT Claimed?	Gross £	Pay Total £	Due Total £		Due	# Lines	
932	07/08/2024	321	Purchase	£40.00	£0.00	No	£40.00	£0.00	£40.00	Unpaid	07/08/2024	1	

Repeat Transfers

Repeat transfers can only be set up from existing transfers.

1. Select an existing transfer and click **Repeat Transfer**
    a. A window will open giving you the same options as for a **Repeat Invoice**, bar the payment account
    b. Enter the repeat details for the transfer
    c. Click **Save** to save the repeat
2. Upon saving a repeat icon will appear next to the original transfer

Repeat Payments

Repeat payments can only be set up from existing payment records. This can be done via **Other Actions > View/Amend Payments**.

1. Select an existing payment record and click **Repeat Payment**
    a. A window will open giving you the same options as for a **Repeat Transfer**
    b. Enter the repeat details for the payment
    c. Click **Save** to the save the repeat
2. Upon saving a repeat icon will appear next to the original payment

Repeated payments will continue until one of two following conditions are met

1. The final payment (as set in the **Create Repeating Event** window) occurs

OR

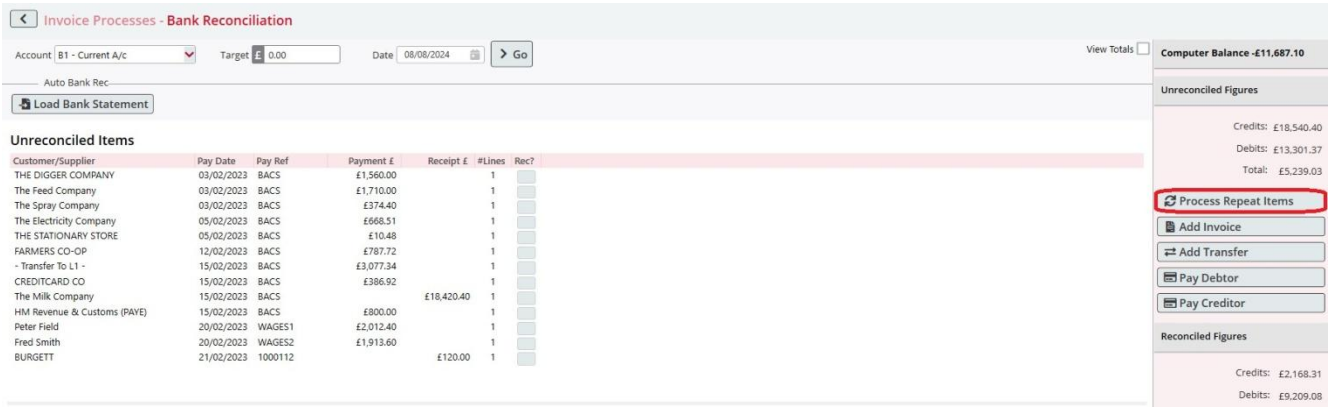
2. The invoice is **fully paid** by previous repeated payments

This prevents the invoice from becoming **overpaid**.

Processing Repeat Items

To process any repeat items (invoice, transfer or payment) navigate to **Other Actions > Repeat Invoices/Payments**.

Alternatively navigate to **Invoice Processes > Bank Reconciliation > Process Repeat Items** to be brought to the same page (**Date Until** and **Pay Account** will automatically fill with whatever was selected for the **Bank Reconciliation**).



1. Select **Record Type**, **Repeat Until** date and **Pay Account** then click **Search**
2. All items select for process will appear. From here you are able to delete or edit the details of individual repeat items by selecting the line
3. Click **Process** to add all items to the accounts