# GETTING MORE FROM . . . . QUICKBOOKS – USING 'RECURRING' SALES INVOICES

What do 'Recurring Invoices' do ?

The '*Recurring Invoices'* feature in Quickbooks, enables the automation of regular invoices (of the same amount) that are currently being manually issued to clients or customers e.g. retainer invoices, support invoices etc.

The feature typically allows invoices to be issued at specified frequency e.g. weekly, bi monthly, monthly, quarterly or annually etc. for a particular period of time !
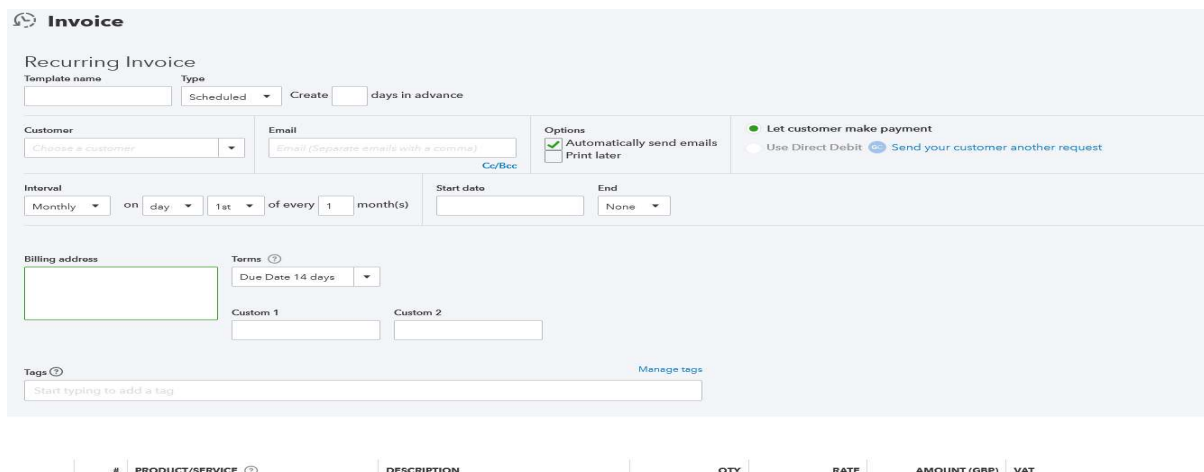
How do I use it within Quickbooks ?
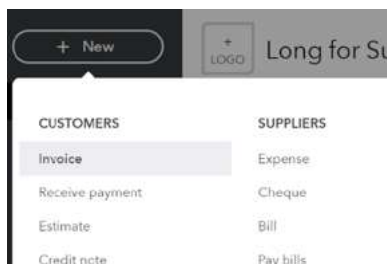
Select the '*Invoice*' option and specify the relevant customer.

Complete the invoice in the normal way with details such as '**Description**', '**Quantity**', '**Value**', '**Class/Location**' etc., and then select the '*Enable Recurring Payments'* option
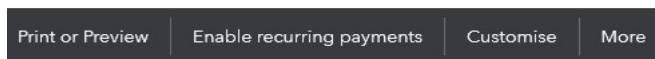
Then add in the '**recurring**' criteria such as '**frequency**', **date of invoice'**, and '**timeframe(s)'** for invoices to be issued to the customer etc.

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Why should I use it in my business ?

- **Save time** – Eliminate the manual time and effort of generating customer invoices with **identical** values, as well as the need to manage a schedule of reminders for the invoices, freeing up your time to focus on more important things.

- **Accurate data** – invoice data is consistent on each occasion with the invoice(s) being raised from the **'recurring'** elements that are setup using the initial invoice

- **Simpler & Quicker Payment(s)** – payment for '**recurring'** invoices (on the '**due date'**) can be authorised at the outset by customers via GoCardless, or alternatively through adding a **'link'** on each invoice to enable online payment of each invoice using PayPal

Do I need to set it up in Quickbooks ?

Yes, the recurring option needs to be setup separately on each occasion for each customer.

Is there any additional cost or is it included in my current subscription ?

No, the setup process is fairly simple and straightforward within the core Quickbooks software.

Can the Sakura Team assist with this ?

Yes.

If you are on our Quickbooks annual **Support service**, then just arrange a call with Nasima and the team, who will make the adjustments in your software. Alternatively we can provide you with a straightforward **How To Guide.**