

Recurring Invoices

The Recurring Invoice feature, let's the users to use a SO as template and generate Invoice from that SO regularly based on some frequency.

Enable Recurring, Recurring Frequency, Start Period and End Period, Payment duration and Invoice Status are taken as input in the SO. Based on whether the Recurring is enabled or not, Invoice is generated at specified frequency between the start and end periods. The **due date** for the generated Invoice is set to the **(Generated date + payment duration)** and the **status** is set to the same as the one set for **Invoice Status** in Recurring Invoice Information block.

Recurring Frequencies supported are: Daily, Weekly, Monthly, Quarterly, Yearly.

Following is the snapshot of a SO creation page:

Creating New Sales Order

Basic Information More Information

Save Cancel

Sales Order Information

*Subject	<input type="text"/>	Potential Name	<input type="text"/>
Customer No	<input type="text"/>	SalesOrder No	AUTO GEN ON SAVE
Quote Name	<input type="text"/>	Purchase Order	<input type="text"/>
Contact Name	<input type="text"/>	Due Date	2008-12-11 <small>(yyyy-mm-dd)</small>
Carrier	BlueDart	Pending	<input type="text"/>
Status	Approved	Sales Commission	<input type="text"/>
Excise Duty	<input type="text"/>	*Account	--None--
Assigned To	User Group admin		Approved

Recurring Invoice Information

Enable Recurring	<input type="checkbox"/>	*Frequency	Daily
Start Period	2008-12-11 <small>(yyyy-mm-dd)</small>	End Period	2008-12-11 <small>(yyyy-mm-dd)</small>
*Payment Duration	Net 30 days	Invoice Status	Approved

The image shows a screenshot of a web application interface for creating a new sales order. The interface is divided into two main sections: 'Sales Order Information' and 'Recurring Invoice Information'. The 'Sales Order Information' section contains various input fields for customer and order details, including a dropdown for carrier and status. The 'Recurring Invoice Information' section includes a checkbox for 'Enable Recurring', a dropdown for 'Frequency' (set to 'Daily'), date pickers for 'Start Period' and 'End Period', a dropdown for 'Payment Duration' (set to 'Net 30 days'), and a dropdown for 'Invoice Status' (set to 'Approved'). Two dropdown menus are open, showing options for 'Account' and 'Invoice Status'. The 'Account' dropdown lists '--None--', 'Daily', 'Weekly', 'Monthly', 'Quarterly', and 'Yearly'. The 'Invoice Status' dropdown lists 'Approved', 'AutoCreated', 'Created', 'Credit Invoice', 'Paid', and 'Sent'. Red boxes highlight the 'Enable Recurring' checkbox, the 'Frequency' dropdown, and the 'Invoice Status' dropdown. Red lines connect the 'Daily' option in the 'Account' dropdown to the 'Daily' option in the 'Frequency' dropdown, and the 'Approved' option in the 'Account' dropdown to the 'Approved' option in the 'Invoice Status' dropdown.

A Cron job has to be set to run every day, which will fetch the SO to be used as template for Invoice creation based on the Frequency set for the SO. All the information from the SO template is moved to the new Invoice created and the product quantity is deducted every time a Invoice is generated.

1) Windows Users:

Following is the contents of the **RecurringInvoiceCron.bat** file to setup the Cron job (This file resides in <vtigercrm_root_directory>/cron/modules/SalesOrder)

```
set VTIGERCRM_ROOTDIR="C:\Program Files\vtigercrm5\apache\htdocs\vtigerCRM"  
set PHP_EXE="C:\Program Files\vtigercrm5\php\php.exe"  
  
cd /D %VTIGERCRM_ROOTDIR%  
  
%PHP_EXE% -f vtigercron.php service="RecurringInvoice" app_key="YOUR_APP_KEY_HERE"
```

Update the VtigerCRM root directory, Php patch and the app_key (can be found in config.inc.php file) and set this batch file to be run every day.

2) Linux Users:

Following is the contents of the **RecurringInvoiceCron.sh** file to setup the Cron job (This file resides in <vtigercrm_root_directory>/cron/modules/SalesOrder)

```
wget "http://localhost:APACHEPORT/vtigercron.php?service=RecurringInvoice  
&app_key=YOUR_APP_KEY_HERE" -O /dev/null
```

Update the crm url, port and the app_key (can be found in config.inc.php file) and schedule this shell script to be run every day.

Developer Notes

New tables added:

```
CREATE TABLE vtiger_invoice_recurring_info(salesorderid INT, recurring_frequency VARCHAR(200), start_period DATE, end_period DATE, last_recurring_date DATE default NULL)
```

```
CREATE TABLE vtiger_recurring_frequency(recurring_frequency_id INT, recurring_frequency VARCHAR(200), sortorderid INT, presence INT)
```

New block added:

'Recurring Invoice Information'

New fields added:

SalesOrder - > enable_recurring, recurring_frequency, start_period, end_period

Files modified:

1. vtigercron.php
2. include/js/general.js
3. include/Utils/ListViewUtils.php
4. modules/SalesOrder/SalesOrder.php
5. modules/Settings/PickList.php
6. schema/DatabaseSchema.xml
7. modules/Users/DefaultDataPopulator.php
8. modules/Migration/DBChanges/504_to_510.php
9. include/ComboStrings.php
10. include/PopulateComboValues.php
11. install/5createTables.inc.php

Files added:

1. modules/SalesOrder/RecurringInvoiceHandler.php
2. cron/modules/SalesOrder/RecurringInvoice.service
3. cron/modules/SalesOrder/RecurringInvoiceCron.bat
4. cron/modules/SalesOrder/RecurringInvoiceCron.sh

Note:

Eventing is used to cleanup the Recurring information when recurring is disabled for the SO.