

Creating a Recurring Invoice

Overview

This guide will show you how to schedule a Recurring Invoice.

Navigation

Within myUFL, navigate to:

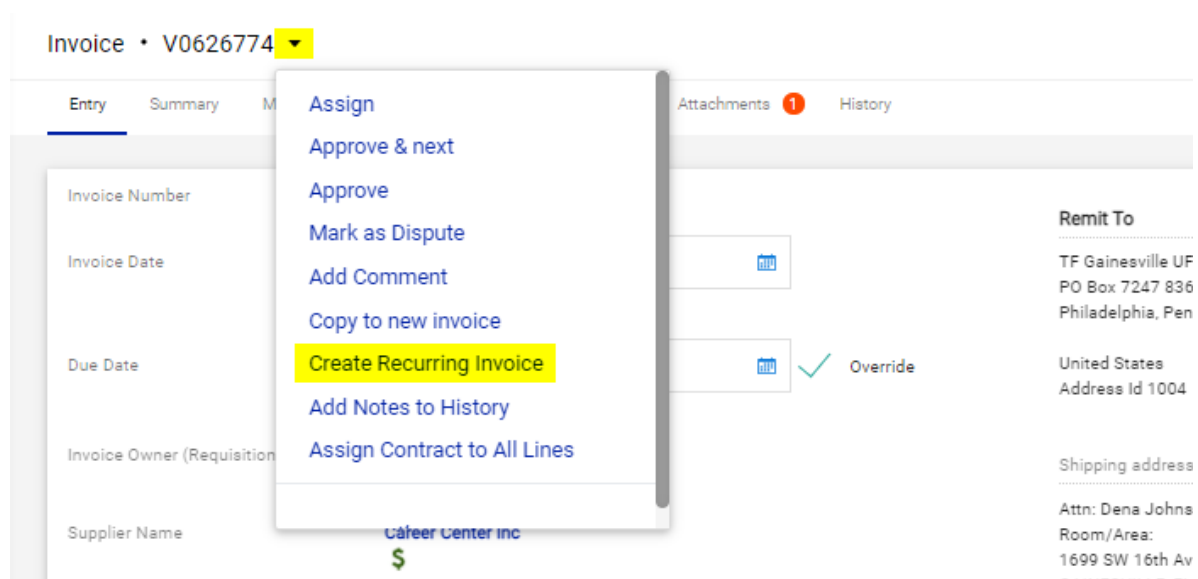
- ⇒ Nav Bar
- ⇒ Main Menu
- ⇒ My Self Service
- ⇒ myUF Marketplace

Process

Begin this process by [creating an invoice](#).

Making a Payment Recurring

1. Click on **Accounts Payable icon**.
2. Click **AP Home**.
3. Search for the invoice you want to make recurring.
 - When you find it, click on the **Invoice number**.
4. Open the **drop-down menu** in the upper left-hand of the invoice.
5. Select **Create Recurring Invoice**.



- Add information to the form.
 - Name the **Recurring Invoice**.
 - Add the **Description**.
 - Select your **Schedule Type** and **Occurrence**.
 - Choose the **Monthly Schedule**.
 - Check the **Time Zone**.
 - Select the **Start Date**.
 - Determine the **End By** date.
 - Select **Due Date** (determines when the system creates recurring invoices)
 - **Payment Terms Due Date**
 - **First Day of the Following Month**
 - **Last Day of the Month**
 - **Days Past Invoice Date**

- Click **Create**.

You will see a success notification.

Important tips:

- **Start Date** is the day when the schedule will start creating recurring invoices as long as the original invoice has completed workflow. **To prevent two invoice payments in the first month, make sure the Start Date isn't set for the same month as the original invoice.**
- Wireless device reimbursement schedules do not have to have an end date or be limited to 12 monthly payments. myUF Marketplace creates each recurring invoice on the scheduled Start Date and the invoices will only go to Peoplesoft after the department approver (level 2) has reviewed and approved the recurring invoice.
- Need to cancel a recurring invoice?
Any recurring invoices that should not be paid can be canceled by the department approver (level 2) in myUF Marketplace before going to Peoplesoft for payment. Canceling a recurring invoice is useful if an extra invoice was created due to the recurring invoice schedule starting in the same month as the original non-po invoice.

Create Recurring Invoice

Name *

Monthly Career Center Invoice

Original Invoice

V0626774

Supplier

Career Center Inc

Description

payment for temp employee

975 characters remaining

Schedule Type *

Monthly

Every

1

Months

Monthly Schedule *

From Start Date

For schedules starting on the 29-31 days of the month, schedules will always be sent on the last day of the month.

Time Zone *

EDT/EST - Eastern Standard Time (US/Eastern)

Start Date *

8/1/2021 12:00 PM

mm/dd/yyyy hh:mm a

End By *

☐ No End Date
 ☒ End By

End Date *

10/1/2021 12:00 PM

mm/dd/yyyy hh:mm a

Due Date

Payment Terms Due Date

★ Required

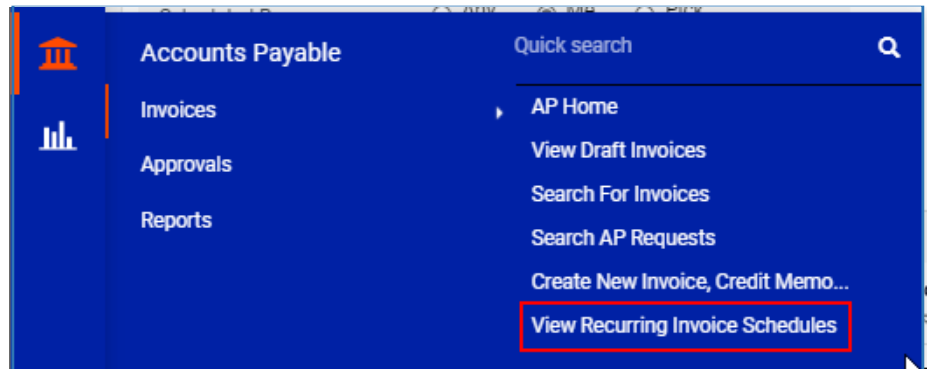
Create

Cancel

Cancel/Deactivate a Recurring Schedule

If the entire recurring invoice schedule should be canceled:

- Click on the Accounts Payable icon.
- Click on **Invoices**.
- Click on **View Recurring Invoice Schedules**.
- Expand the **Filter** section.
- On the **Scheduled By** field, click **Me** if you created the recurring schedule.
- Make sure Status is set to **Active** and click **Apply**.
- On the results page, find the original invoice used to create the recurring schedule.
- Click the **Actions** drop down to the far right of the invoice line and select **Deactivate**.
- **Important tips:**
 - Please be sure to verify the correct recurring invoice number prior to deactivating.
 - There is also the option to edit a schedule and view any invoices (occurrences) that were created using the recurring schedule.



The screenshot shows the 'Recurring Invoice Schedules' filter section. It includes a 'Filter' header, a 'Supplier' search field, and three filter criteria: 'Scheduled By' with radio buttons for 'Any', 'Me' (selected and highlighted with a red box), and 'Pick...'; 'Status' with a dropdown menu showing 'Active' (highlighted with a red box); and an 'Apply' button (highlighted with a red box).

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Scheduled	Next Due Date	End Date	Remaining	
2021 12:00 AM	Payment Terms Due Date	no value	-	Actions ▼
2021 12:00 AM	Payment Terms Due Date	no value	-	Edit Deactivate View Occurrences
2021 12:00 AM	Payment Terms	no value	-	Actions ▼

Additional Assistance
Marketplace Help Desk
Phone: (352) 392-1335