Partners | Invoices

~ RECURRING INVOICES ~

The data entered in this tab enables automatic periodic creation of invoices to a customer, e.g. every month on the same day, quarterly, once a year or on the last day of the month. Brix leaves the created invoices in preparation; the user closes them and sends them to the customer in the Invoices form.

Invoice settings

- ***{Template}***
  Template from which the basic data is copied into the header of every recurring invoice.
- ***{Invoice last day of month}***
  When marked, all recurring invoices of the partner are created on the last day of the month, regardless of whether the month has 28, 29, 30 or 31 days. Applies to all items of the partner.
- — Printout of a draft invoice.
  - The printout is currently not in use.

Item list

The list shows the goods and services periodically invoiced to the partner. Selecting an item in the list opens it for editing.

About filters and finding data in lists

- **#** — Ordinal number of the item on the invoice.
- **Name**, **Qty**, **UoM**, **Unit Price**, **Discount** — Data transferred to the invoice item.
- **From date**, **To date** — Invoicing period of the item.
- **Freq** — Invoicing frequency, with a mark showing whether it refers to months or days.
- **Last** — Date of the last invoice created for the item.

— Adding a new item.

Item

- ***{Department}***
  Department in which the invoice for this item is created.
- ***{#}***
  Ordinal number of the item on the invoice.
- ***{Item}***
  Goods or service from items being invoiced. shows the item details, and opens the item for editing.
- ***{Name}***

Name of the item on the invoice. Pre-filled with the item name and can be changed.

- ***{Purchase Order/Contract}***
  Printed in the invoice header and applies to all invoices of the partner, regardless of department.
- ***{Description}***
  Description printed next to the name in the invoice item.
- ***{Notes}***
  Printed at the end of the invoice as a note for the whole invoice.
- ***{Quantity}***
  Quantity of goods or services on the invoice.
- ***{Unit Price}***
  If left empty, the price is taken at each invoice creation from the price list valid on the invoice date. An entered price is fixed and does not change when the price list changes.
- ***{Discount %}***
  Discount rate in percent.
- ***{From date}***
  Date from which invoicing of the item begins. If not entered, the first invoice is created according to the date in ***{Last Invoice/Fee}*** increased by the frequency.
- ***{To date}***
  Date until which the item is invoiced. If left empty, the item is invoiced until further notice.
  - Invoicing of an item can be stopped without deleting it by entering a past date, which is useful for seasonal services or a temporary suspension of invoicing.
- ***{Frequency}***
  Every how many months or days an invoice is created, counting from the date in ***{Last Invoice/Fee}***.
  - The frequency cannot be 0. For one-off invoicing, the same date as in ***{From date}*** is entered in ***{To date}***.
- ***{Days or Months}***
  Determines whether ***{Frequency}*** refers to days or months.
- ***{Charge}***
  As a rule, *Partner* is selected.
- ***{Last Invoice/Fee}***
  Date of the last recurring invoice created for the item. It determines the day of the month on which invoices are created, and Brix updates it with each invoice created. When an item is first entered, a date one frequency earlier than the desired date of the first invoice is entered.

Next to the date fields, enters today's date and opens the calendar.

How items are grouped into invoices

- A separate invoice is created for each department.
- Within the same department, items with the same ***{From date}*** are placed on one invoice; items with different ***{From date}*** values are placed on separate invoices. This way several invoices can be issued to the same partner, e.g. one on the 1st and another on the 15th of the month.

Buttons

Buttons in the item dialog:

- **SAVE** — Saves the item.
- **DELETE** — Deletes the item. Shown when editing an existing item.
- **CANCEL** — Closes the item dialog without saving changes.

Examples

The examples assume today's date is 26.10.2026.

1. Monthly invoicing on the 28th of each month, first invoice on 28.11.2026, invoiced until further notice:
   - ***{From date}***: not entered
   - ***{To date}***: not entered
   - ***{Frequency}***: 1, ***{Days or Months}***: Months
   - ***{Last Invoice/Fee}***: 28.10.2026
2. Monthly invoicing on the 25th of each month, first invoice on 25.01.2027, last invoice on 25.06.2027:
   - ***{From date}***: 25.01.2027
   - ***{To date}***: 25.06.2027
   - ***{Frequency}***: 1, ***{Days or Months}***: Months
   - ***{Last Invoice/Fee}***: 25.12.2026
3. Quarterly invoicing on the 1st of the month, first invoice on 01.01.2027, last invoice on 01.10.2027:
   - ***{From date}***: 01.01.2027
   - ***{To date}***: 01.10.2027
   - ***{Frequency}***: 3, ***{Days or Months}***: Months
   - ***{Last Invoice/Fee}***: 01.10.2026
4. One-off invoicing on 15.12.2026:
   - ***{From date}***: 15.12.2026
   - ***{To date}***: 15.12.2026
   - ***{Frequency}***: 1, ***{Days or Months}***: Months
   - ***{Last Invoice/Fee}***: 15.11.2026

Limitations



Recurring invoices are created exclusively in preparation and are not sent to the customer automatically. Each created invoice has to be reviewed, closed and sent to the customer from the Invoices form.

From:
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Last update: **26/10/2026 18:36**