

How to Automate Recurring Invoices in QuickBooks

There are many businesses that send invoices to their customers on a recurring basis—weekly, monthly, quarterly and/or annually. You can automate recurring invoices in QuickBooks which can save a HUGE amount of time.

With a little bit of upfront work and ongoing maintenance, you can send out recurring invoices with just a few clicks.

This same process will also help you remember your scheduling calendar for service visits businesses, like HVAC or pest control companies.

Create a Memorized Transaction Group

1. Go to **Lists > Memorized Transaction List**
2. Click on the **Memorized Transaction** button, and select **New Group**
3. Name the group, (Annual, Semi Annual, Quarterly, and even one for each month) select **Automatically Enter**, **How Often** and **Next Date**. For instance, if you are setting up monthly invoices, name it Monthly Invoices, select Monthly, and the date the next set of monthly invoices should go out. If you are setting up annual invoices for the month of June, name it June Invoices, select Annually, and the date the next June invoices should go out

Memorize your recurring invoices

1. Open each customer's invoice, (if you have billed them in the past) that you want to automatically process on a recurring basis, make sure **To be printed** and/or **To be e-mailed** is checked. If you have not billed them in the past, you will set up the first one, but not actually record it. It is like you are entering a 'pretend' invoice just to memorize it for use in the future.
2. Go to **Edit > Memorize Invoice**, select **With Transactions in Group**, and select the group you created above
3. Make sure to close the invoice **without recording it.** (**You are just reminding QB to post it in the future**)

Edit the memorized invoices for any changes that occur

1. Go to **Lists > Memorized Transaction List**
2. Double-click on the invoice you want to modify
3. Make your changes
4. Go to **Edit > Memorize Invoice**
5. Choose **Replace** in the popup box
6. Close the invoice without recording it

On or after the date the invoices are automatically entered, print out the invoices

1. Go to **File > Print Forms > Invoices**, click **Select All** and then **OK**
2. Go to **File > Send Forms**, click **Select All** and then **Send Forms**