Recurring Billing

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"GETTING STARTED GUIDE"

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Create Recurring Billing In CAP SellWise:

➢ In order to utilize recurring billing in your business, it is necessary to have CAP SellWise.

1. From the CAP back office toolbar, go to **Help >> Configuration >> Store Settings**. In the *Accounting* section, set *Post Recurring Invoices* to **Yes**. Press **Accept** to save then **Esc** out of Store Settings and **Close** out of Configuration. Then, restart CAP.
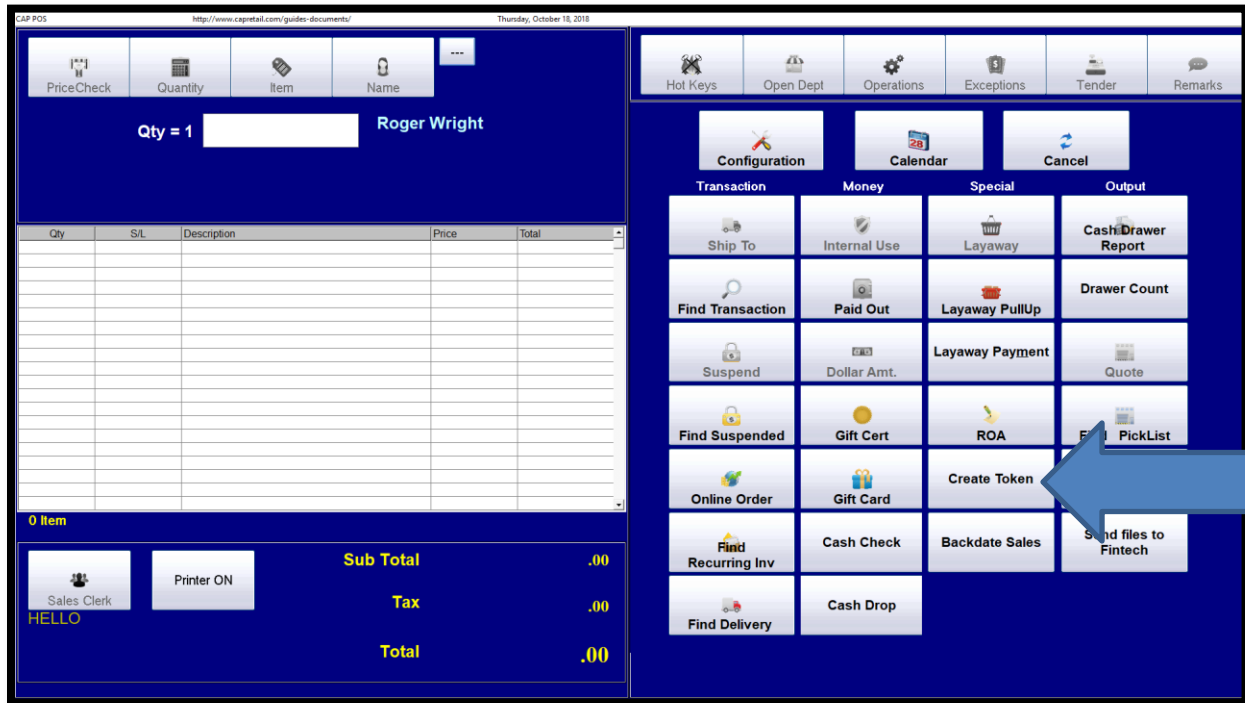
| ACCOUNTING	
External Accounting Program	None
Accounting Program Path	
Post Recurring Invoices	Yes
Match Payments against Invoices (Track Invoices)	No
Default AR Terms	30 Days

Create Recurring Bill for a Customer:

1. To attach a new recurring bill to a customer, open **CAP POS** and add or select the customer in the **Names** database.
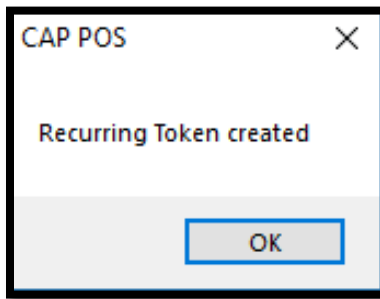
2. Next go to **Operations** and select **Create Token** to save their payment information.
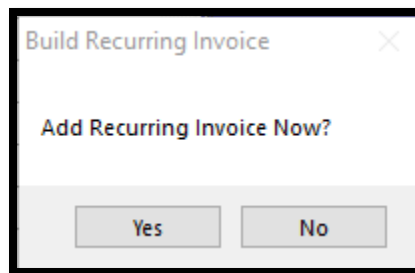

3. Press **Swipe** or **Manual** to enter the card number. If using a credit card with a chip, press **Swipe** and insert the card.
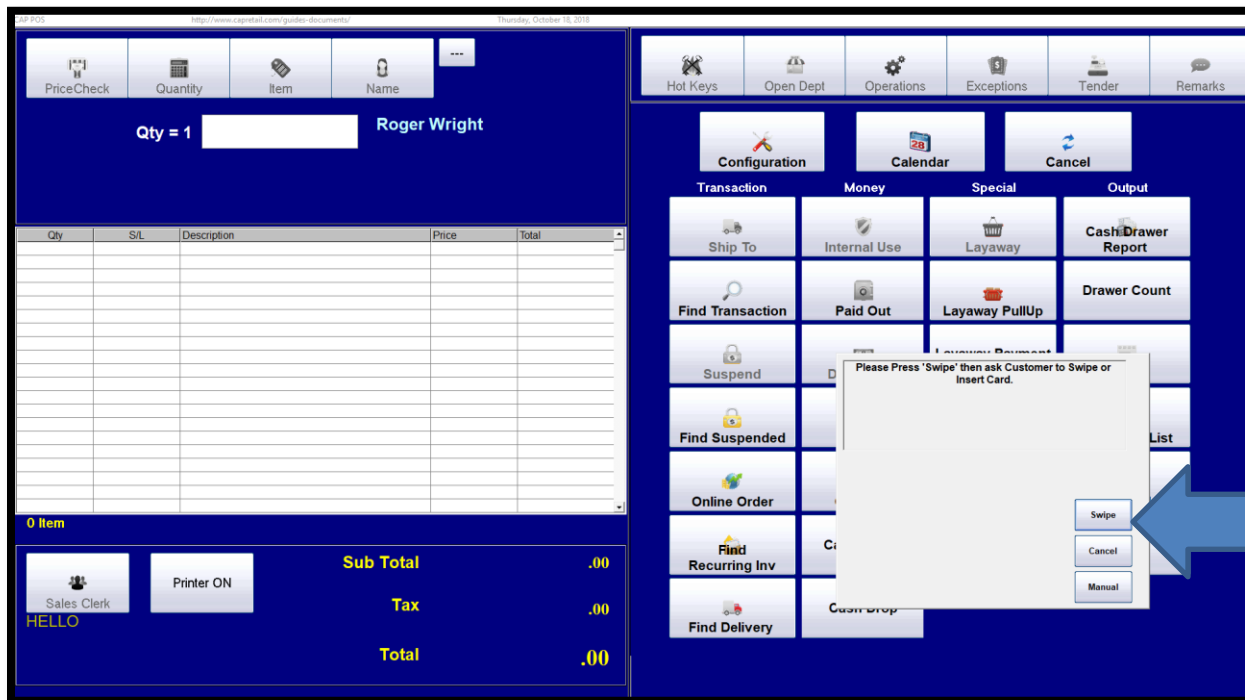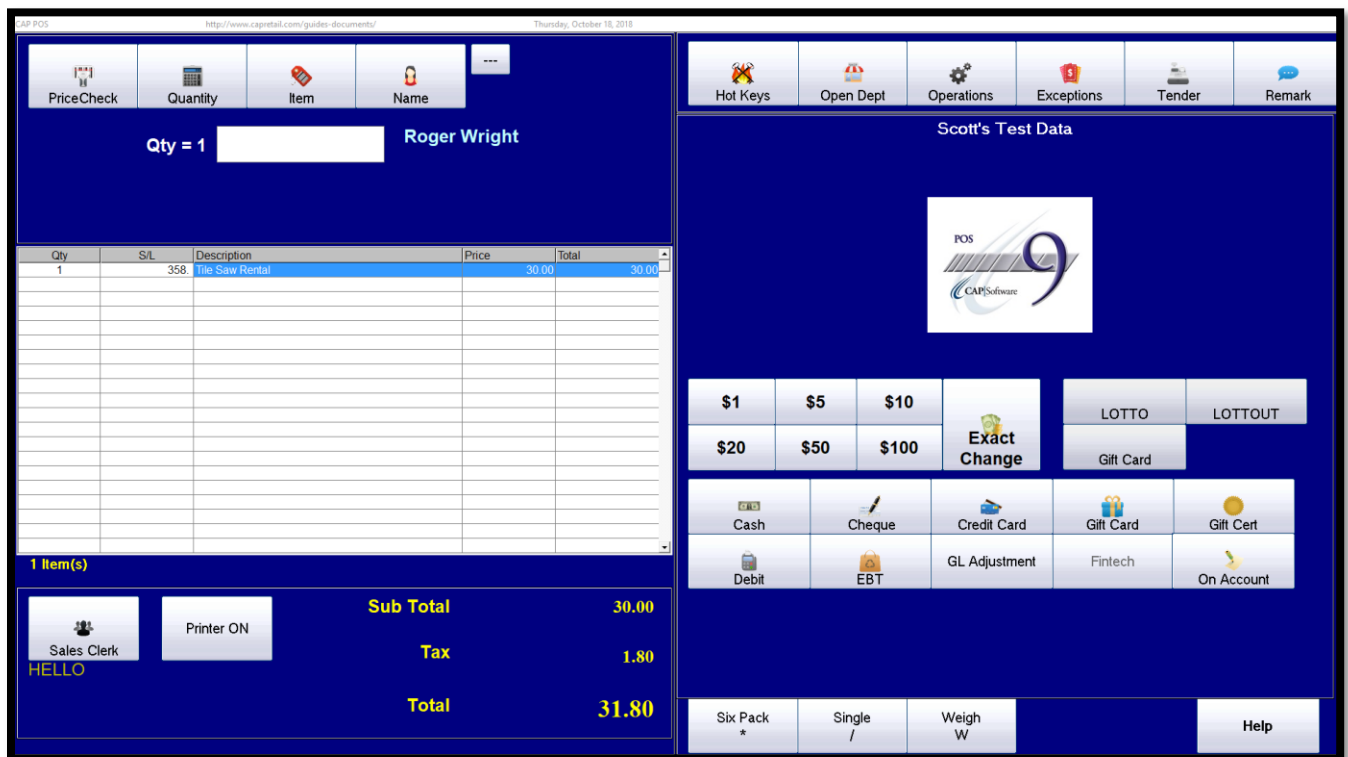
4. Press **OK** to complete the token creation step.

5. Now that the Token is created, press **Yes** to start creating the recurring invoice.

6. Add the customer's items to the sale by scanning or searching.

7. After adding all the items, go to **Operations** and select **Save Recurring Invoice**.

8. Review the Reference field and press **Accept** to save the invoice and attach it to the customer.

9. Next, set the **Frequency** and verify the **Date next Charge** is what you want it to be.

10. Next, tender the sale for the initial charge amount. Select the **Tender** type and complete the transaction. For rental items, add the serialized item and select the correct serial number.

➢ You have now finished setting up a recurring bill for a customer.

Review Recurring Invoices:

1. To review your recurring invoices, from the CAP back office toolbar open **Names** and select **Sales and Pricing**. There is now a 'Recurring Payments' section at the bottom right of the menu.
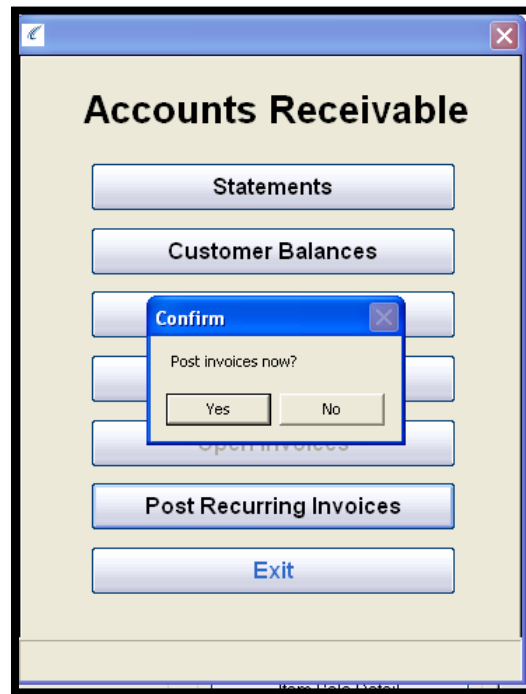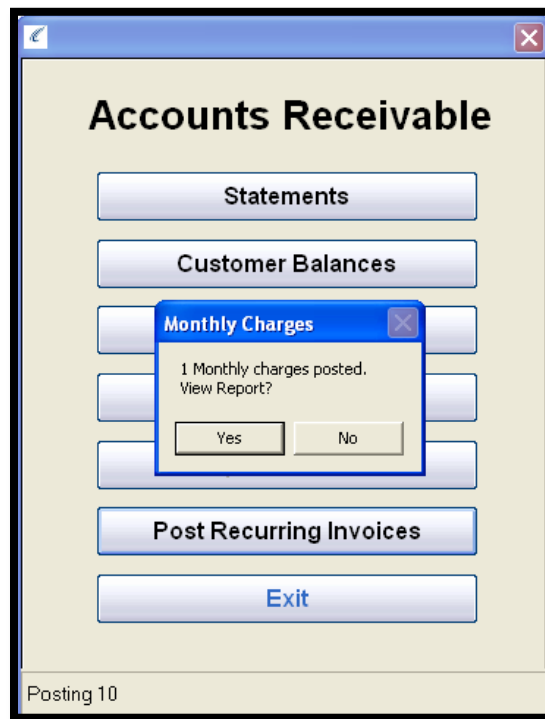

Generating a Bill:

1. To run scheduled invoices, from the CAP back office toolbar go **Reports** and in the *Customer* section select **Accounts Receivable**. Then, select **Post Recurring Invoices**.

2. Select **Yes** to generate an invoice for each customer with a recurring bill set up.

3. You will get a confirmation of how many accounts were billed. Press **Yes** to see the Report.

4. You can save or print the report at this time. Any declined credit card transactions will be posted as On Account sales and listed as such on this report.