



Recurring Billing Manager



User Manual

Content

Introduction 3

Inogic Settings..... 3

Configuration - Schedules 5

 Billing Schedules 6

 Billing Lines..... 9

 Delayed Charge Schedules..... 10

 Reminder Schedules 11

 Reminder Rules 13

Configuration - Others 15

 Attachable Reports 15

 Functional Contacts 17

 Functional Roles..... 19

Billing - Invoices 20

Auto Process 23

 Workflow Triggers..... 23

 Synchronize Line from Billing Lines..... 27

 Copy Reminder Schedules 28

Contact Us..... 30

Introduction

Recurring billing can prove to be a tedious and daunting task for the sales team. However, with Recurring Billing Manager the process of billing can be automated with flexible billing schedules and instant invoice creation on daily, monthly, quarterly and annual basis. It enables creating payment reminders and sending notifications to customers and apply penalty on late payments. With flexible and automatic billing schedules, the task of billing is streamlined and made easy for the users.

Salient Features:

- Automated and Flexible billing system that lets you automatically bill annually, quarterly, monthly, or even daily
- Create OOB Invoices on demand or automate by scheduling them
- Set up Delayed Charge Schedules for Penalty calculation on overdue transactions
- Schedule automatic reminders for your customers regarding their upcoming or past due payments
- Flexibility to define the set of people who should be receiving Billing emails or who should be receiving emails about overdue payment, etc.

Available for: Microsoft Dynamics 365 v8.2 and above, Power Apps.

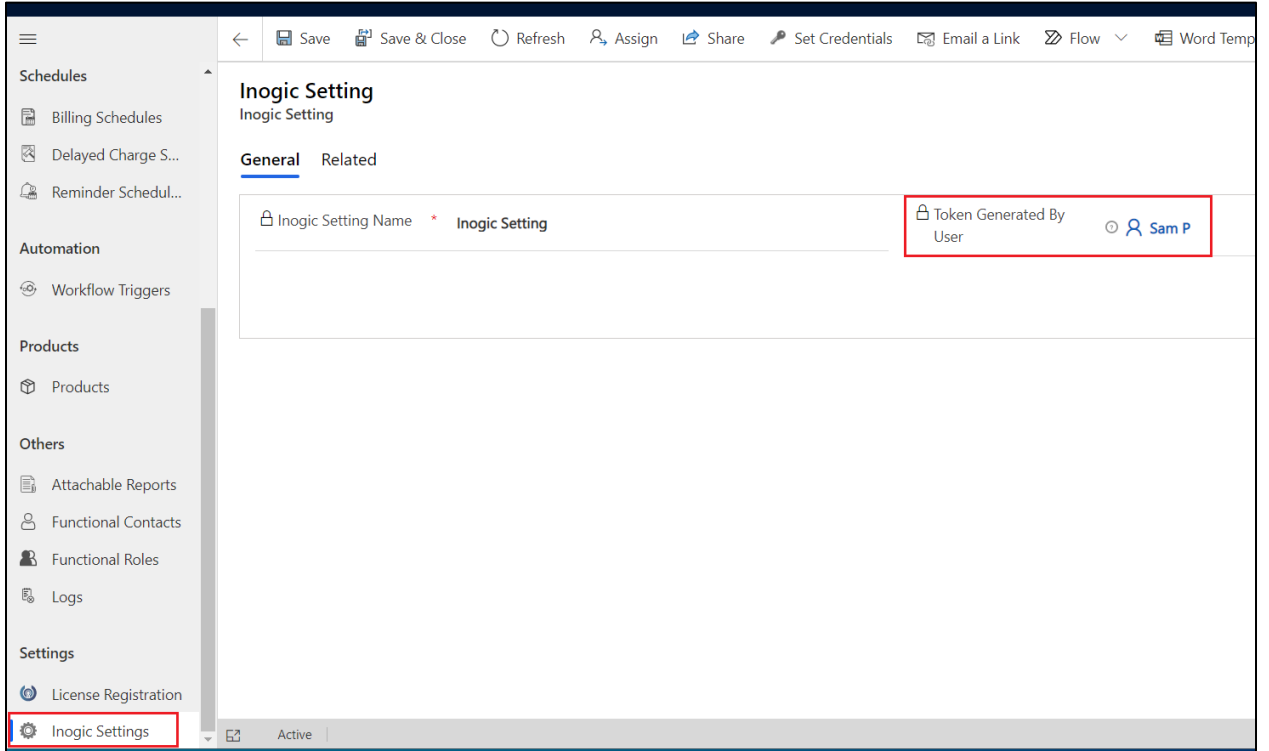
Deployment: On-Premises & Online.

Inogic Settings

The Inogic Settings entity stores the system settings. This includes two fields which are not editable.

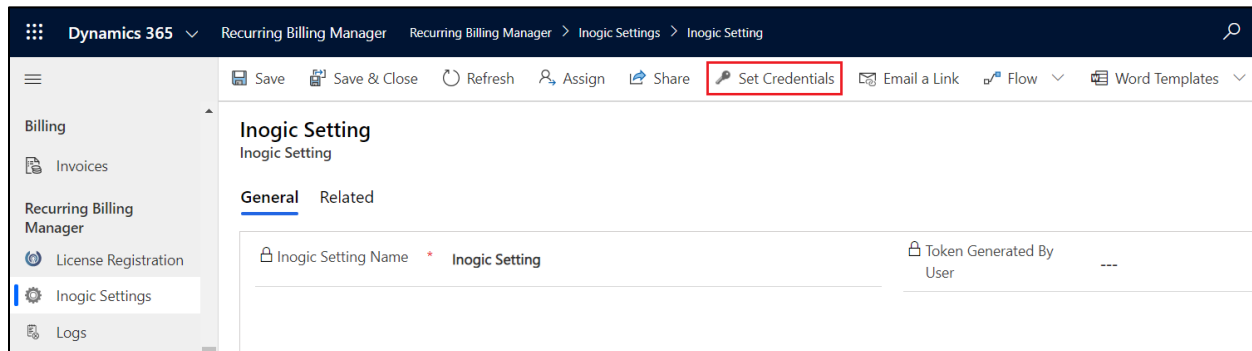
- **Inogic Setting Name:** This field is pre-populated.
- **Token Generated By User:** This field is set when the token is generated using the Set Credentials button. The value set is the one who generates the token i.e. Logged in user. The tokens generated are needed to convert the word template of invoice to PDF that we send to the customer along with the email reminders as attachment.

Recurring Billing Manager – User Manual

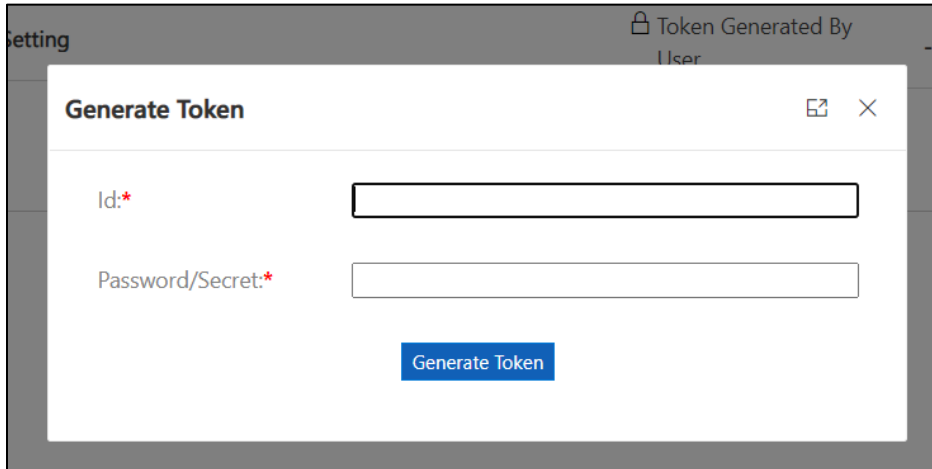


To generate ‘Token’, follow the steps given below:

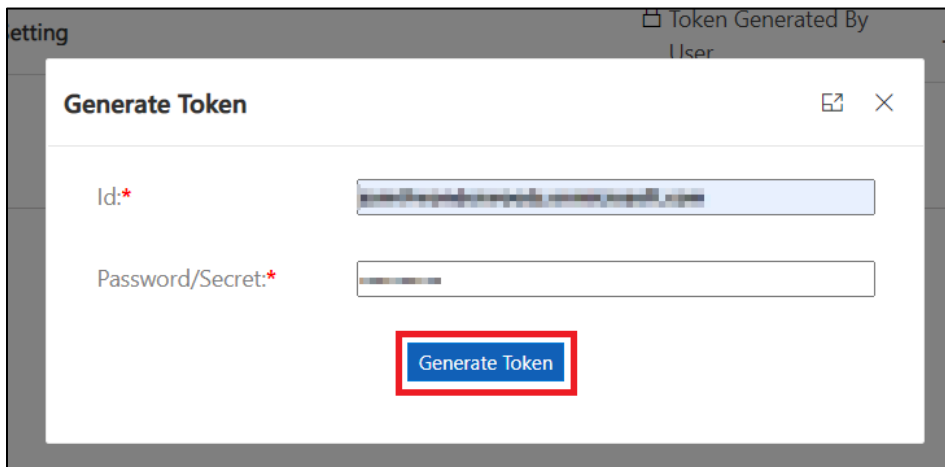
- 1) Go to the ribbon bar → Click on the ‘Set Credentials’ button.



- 2) A dialogue will appear. Populate the fields in the dialogue box with relevant information.
 - a. **Id:** The username used by the user to login to CRM.
 - b. **Password/Secret:** The password used by the user to login to CRM.



3) Click on **'Generate Token'**.



If the credentials of the user that are used to generate tokens have MFA enabled, then the user need to enter the APP Id and **Secret key** of the APP in the **Azure** directory. To create APP in Azure, follow the steps given in [this blog](#).

Configuration - Schedules

Recurring Billing Manager solution helps users to automate the process of creating Invoices on daily, weekly, monthly or annual basis by setting flexible schedules. Users are given the provision to set the following schedules to make the billing process easy and effortless:

Billing Schedules: Schedule to create regular Invoices for the business.

Delayed Charge Schedules: Schedule to calculate charges on overdue Invoices.

Reminder Schedules: Schedule to send reminders to customers with respect to overdue Invoices.

Billing Schedules

The Billing Schedule entity is used to create a framework for Recurring Billing Manager and what you are going to bill. The Billing Schedule determines whether a transaction should be created, when it should be created, and what values should be set. The user can create as many Billing Schedules as they need and customize them based on common billing attributes such as billing length, frequency, reminders, and penalties. The user can include multiple products to be billed at the same time on the same Sales Invoice.

How to Create a Billing Schedule:

- 1) Navigate to **Recurring Billing Manager** → **Schedules** → **Billing Schedule** → Click on **'+New'**.

The screenshot shows the Dynamics 365 interface for creating a new billing schedule. The left-hand navigation pane has 'Billing Schedules' highlighted with a red box. The main content area is titled 'New Billing Schedule' and has three tabs: 'General', 'Billing Lines', and 'Invoices'. The 'General' tab is selected and contains the following fields:

Billing Schedule Name	---		
Bill To Customer *	---	Next Invoice Date *	---
Ship To Customer *	---	Payment Terms Definition *	---
Billing Frequency *	Annually	Current Invoice	---
Generate When *	Number of Days before Next Invoice Date	Generate Days Count *	---
Duration *	No End Date	Remaining Invoices Count	---
Reminder Schedule	---	Delayed Charge Schedule	---

- 2) Enter the required fields and any other necessary fields.

- **Billing Schedule Name:** A descriptive name of the Billing Schedule. This can be manually entered but if left blank the name concatenates the Ship to Customer and the word ' Billing Schedule'.
- **Bill To Customer:** The Customer to whom the invoice is sent and is responsible for paying the invoice. This could be the Reseller, the Customer, or a third party if they are being billed directly. If you bill the Customer directly, the Bill To Customer and Ship to Customer will be the same. This will appear as the Bill To on the Sales Invoice.
- **Ship To Customer:** The End Customer to whom the product is to be shipped. Here, the Ship to Customer can be same or different.
- **Next Invoice Date:** The date on which the next Invoice is to be generated.

- **Payment Terms Definition:** This entity defines the payment terms that the customer has agreed to. Payment Terms if Selected As Net 30 then automatically the Due Days are set to 30. If the Other option is selected then the Due Days need to be entered as per the requirement.

The screenshot shows a web form titled "New Payment Terms Definition". Under the "General" tab, there are three main fields: "Name", "Payment Terms", and "Due Days". The "Name" field is required (marked with an asterisk) and currently empty. The "Payment Terms" field is also required and has a dropdown menu open. The dropdown menu lists "--Select--", "Net 30", "Net 45", "Net 60", and "Other". The "Due Days" field is required and currently empty.

Billing Frequency Option: The frequency at which to generate invoices for this Billing Schedule. The following options are available:

- Daily
 - Weekly
 - Monthly
 - Quarterly
 - Semi-Annually
 - Annually
- **Current Invoice:** Identifies the current unpaid invoice in the current cycle of this Billing Schedule. Another invoice will not be created until the current invoice is paid if the Generate When Option is '**When Current Invoice is Empty**'.
 - **Generate When Option:** Determines if an Invoice should generate when the Current Invoice field is empty or a specified number of days before Due. The actual generation occurs in a workflow, which is often run as scheduled or on-demand. The following options are available.
 - **Current Invoice is Empty** – If this option is selected then the Billing schedule will generate Invoice if the field Current Invoice is Empty. This field is empty before the first invoice is generated and afterwards if the Invoice generated is paid. Once the Invoice is paid then the Current Invoice field becomes empty.
 - **Number of Days before Next Invoice Date** - Looks at the current Next Invoice Date and generates an invoice the specified number of days prior to that Date. For example, if the Next Invoice Date is 10/1/2020 and the Number of Days before Next Invoice Date is set to 10 then the next Invoice would be generated on 9/21/2020.

Recurring Billing Manager – User Manual

- **Generate Days Count:** Number of days before a Schedule is due to generate an Invoice. For example, if you enter 10, the invoice will generate 10 days before it is due. This field is only available if the 'Generate When Option' is set to 'Number of Days before Next Invoice Date'.
- **Duration Option:** Define whether to bill indefinitely or a specified number of times.
 - **No End Date** – Invoices will be created endlessly.
 - **Bill Specified Number of Invoices** - Allows you to bill for a specified number of invoices. When you select this option, you enter the number of invoices you wish to generate in the Remaining Invoices Count field. Invoices will continue to generate until the Remaining Invoices Count field has 0 invoices remaining to be generated.
- **Remaining Invoices Count:** The remaining number of invoices to generate for this contract when the Duration Option is set to 'Bill Specified Number of Invoice'. This will continue to count down the number of invoices left to generate until it reaches 0. After it reaches 0, no more invoices will be generated.
- **Delayed Charge Schedule:** The Delayed Charge Schedule assigned to the Invoice generated from this Billing Schedule. It is a penalty fee a customer must pay when the invoice is past due. It is an optional field and only used if Delayed Charge Schedules are used.
- **Reminder Schedule:** The Reminder Schedule assigned to the Invoice generated from this Billing Schedule. A Reminder Schedule is an automated reminder sent to the customer regarding their bill and its due date. A different Reminder Schedule can be assigned to each Billing Schedule. It is an optional field and only used if Reminder Schedules are used.
- **Price List:** This field appears in '**Billing Line**' tab. Select the price list for the product. Add the products from the price list once that needs to be billed in the recurring invoice.

Alpine Ski House Billing Schedule

Billing Schedule

General | Billing Lines | Invoices | Related

Billing Schedule Name		Alpine Ski House Billing Schedule	
Bill To Customer	* Alpine Ski House	Next Invoice Date	* 10/20/2020
Ship To Customer	* Alpine Ski House	Payment Terms Definition	* Pay 30
Billing Frequency	* Daily	Current Invoice	Alpine Ski House - October 18, 2020
Generate When	* Number of Days before Next Invoice Date	Generate Days Count	* 1
Duration	* No End Date	Remaining Invoices Count	---
Reminder Schedule	Email reminder	Delayed Charge Schedule	Penalty

Billing Lines

The Billing Line entity is used to enter the information for the Products related to the Billing Schedule. You must have at least one Billing Line on a Billing Schedule. You may also track the quantity and whether the Billing Line is to be billed. The Billing Lines will create lines on the Invoice.

How to Create a Billing Lines:

- 1) Navigate to **Recurring Billing Manager App → Schedules → Billing Schedules →** Open the **Billing Schedule** for which you wish to add the Billing Lines.
- 2) Go to **'Billing Lines'** tab → Click on **'+ New Billing Line'** to add a new line.

Alpine Ski House Billing Schedule
Billing Schedule

General **Billing Lines** Invoices Related

Price List * [India Bill Rates](#)

+ New Billing Line

Product ↑	Is Billable? ↓	Purchase Date ↓	Paid Thru Date ↓	Quantity ↓
iPhone	Yes	10/1/2020	11/18/2020	

- 3) Enter the required information and any optional fields you wish to include.
 - **Billing Line Name:** The name of the billing line made up from the Product concatenated with the Customer.
 - **Billing Schedule:** The parent Billing Schedule associated with the Billing Line. This field is required as a Billing Line cannot exist without a Billing Schedule. This is prefilled with the Billing schedule from where you are adding the Billing lines.
 - **Product:** Product that needs to be added in the Invoice line.
 - **Is Billable:** Select **'Yes'** or **'No'**. This field determines if the Billing Line should generate an Invoice Line when the Billing Schedule generates an Invoice. It is helpful as it allows you to keep history of Billing Lines for Products a Customer may have had but are no longer being billed. If set to No, the line will no longer be billed, but you have record of what has been paid. If the Customer later wants the Product again, you can see what date it was paid through and how much to prorate it if necessary.
 - **Quantity Count:** The quantity to bill on the Billing Line. This is at the line level as each line could have a different quantity. If left blank, it will default to **1** ∅.
 - **Purchase Date:** The date the Product on this Billing Line was originally purchased.
 - **Override Unit Price:** The price per unit if the default price is not wanted. If the field is blank, pricing will be based on the Price List from the Billing Schedule. If a different price is desired, the field may be manually entered.
 - **Paid Thru Date:** Date through which the Billing Line has been paid in full and drives when the next billing is due.

iPhone Alpine Ski House
Billing Line

General Related

Billing Line Name * iPhone Alpine Ski House

Billing Schedule * Alpine Ski House Billing Schedule

Product Details

Product	* iPhone	Is Billable?	* Yes
Quantity	1	Purchase Date	10/1/2020
Override Unit Price	---	Paid Thru Date	11/18/2020

Delayed Charge Schedules

The Delayed Charge Schedule entity is used to create a schedule for the charges customers must pay when their invoice is past due.

How to Create a Delayed Charge Schedule:

- 1) Navigate to **Recurring Billing Manager App** → **Schedules** → **Delayed Charge Schedules** → Click on **'+New'**.

← Save Save & Close + New Flow

New Delayed Charge Schedule

General

Delayed Charge Schedule Name	*	---		
Delayed Charge Product	*	---	Delayed Charge Frequency Option	* Monthly
Delayed Charge Percentage	*	---	Days Past Due Count	* ---

2) Enter the required information.

- **Delayed Charge Schedule Name:** Descriptive name of the Penalty Schedule.
- **Delayed Charge Product:** The Product that will represent the Delayed Charge on the Invoice.
- **Delayed Charge Frequency Option:** The frequency of which to charge a penalty on Invoice. For example, if you choose monthly, every month would have a separate delayed charge line on the Invoice. The following options are available.
 - Once
 - Daily
 - Weekly
 - Monthly
 - Quarterly
 - Semi-annually
 - Annually
- **Delayed Charge Percentage:** The percentage of the Invoice amount to charge as a penalty.
- **Days Past Due Count:** Determines the number of days past due before the delayed charges are triggered.

Penalty
Delayed Charge Schedule

General Related

Delayed Charge Schedule Name *	Penalty	Delayed Charge Frequency Option *	Monthly
Delayed Charge Product *	Penalty	Days Past Due Count *	1
Delayed Charge Percentage *	2.00		

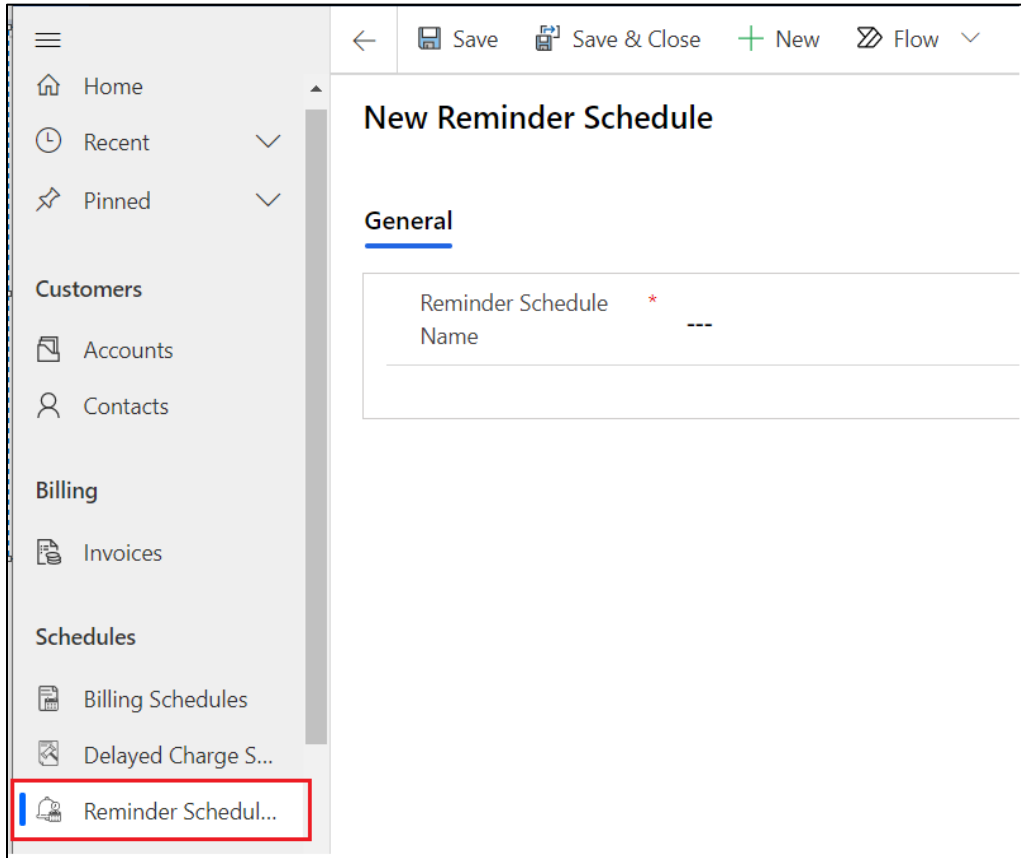
Note: Customer must have a penalty product that will be used as the Delayed Charged Product. Also, the penalty product should be on the same pricelist as of the invoice details.

Reminder Schedules

The Reminder Schedule entity is used to set up a schedule for reminders for customers regarding their billing. For example, create a Reminder Schedule for invoices that are past due or for upcoming renewals of services, memberships, or software. This is a helpful reminder to customers that a penalty could be incurred if not paid on time. The Reminder Schedule is assigned to the Billing Schedule and is displayed on the Invoice when it is created. A workflow is used to automatically generate the reminders.

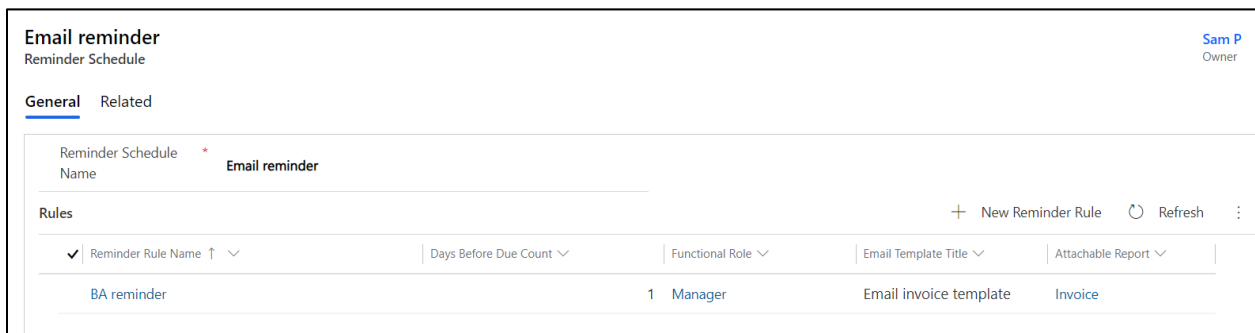
How to Create a Reminder Schedule:

- 1) Navigate to **Recurring Billing Manager App** → **Schedules** → **Reminder Schedules** → Click on **'+New'**.



2) Enter the required information.

- **Reminder Schedule Name:** The created name of the Reminder Schedule.
- **Reminder Rule:** The Rules section includes the information user have created for each reminder.

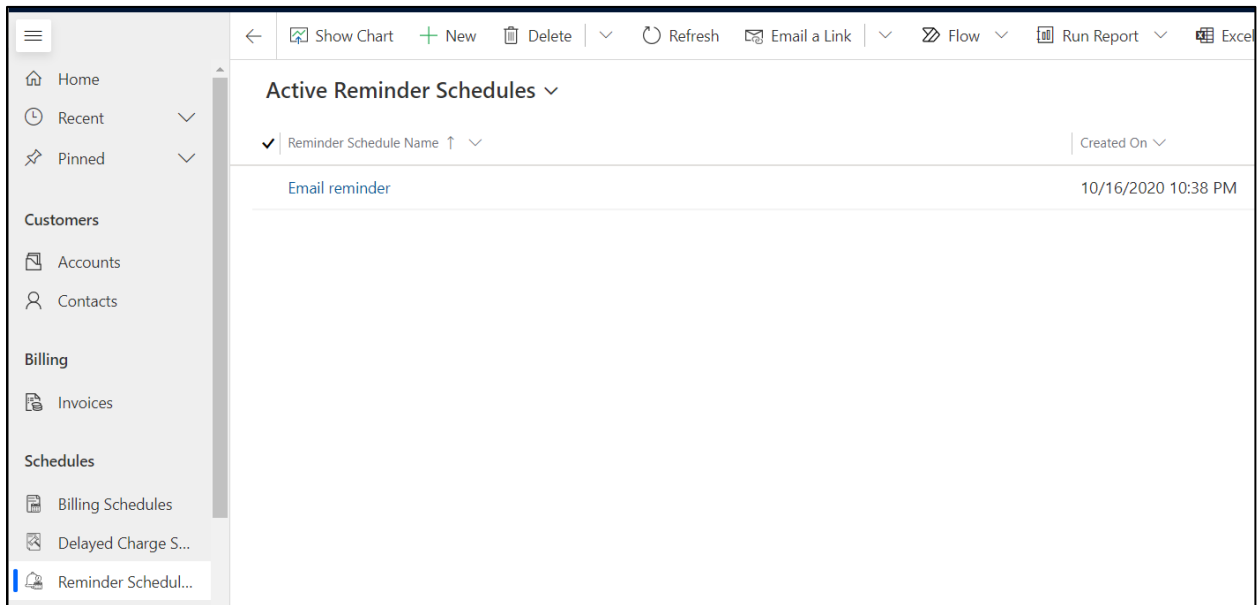


Reminder Rules

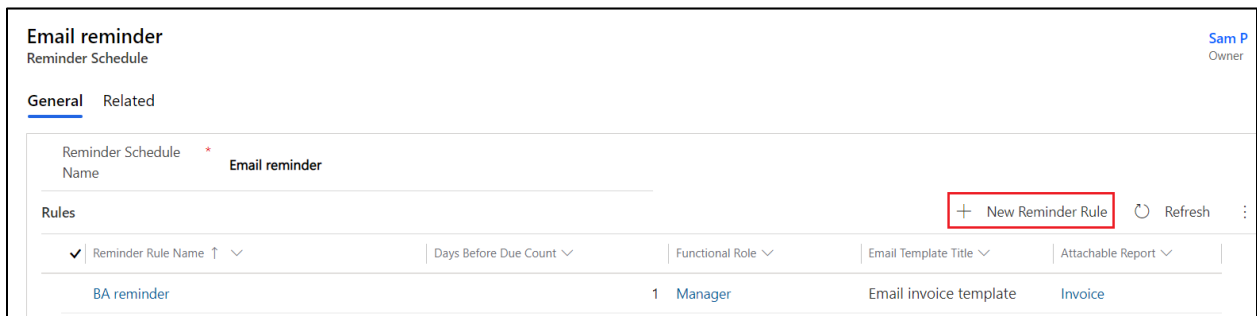
The Reminder Rule entity is used to create the rules around the Reminder Schedule, such as how many days before it is due and the e-mail template to use. You can assign multiple Reminder Rules to a Reminder Schedule. With each rule, the e-mail verbiage can change with each one that is sent. For example, the first e-mail may be a friendly reminder but those sent later may be a little more direct.

How to Create a Reminder Rule:

- 1) Go to **Recurring Billing Manager App → Schedules → Reminder Schedules.**



- 2) Open **the Reminder Schedule** to which you wish to add the rule → In the Rules section, click on **'+ New Reminder Rule'** to add a new rule.



- 3) Enter the required fields and any other needed fields.
 - **Reminder Rule Name:** Descriptive name of the Reminder Rule Name.
 - **Reminder Schedule:** The parent Reminder Schedule associated with this Reminder Rule. This is a required field as a Reminder Rule cannot exist without a Reminder Schedule.

- **Days Before Due Count:** Number of days before an Invoice is due and when the Reminder Rule will be triggered. For example, 5 means the rule is 5 days before the Invoice is due. This also can contain negative values e.g.: -5 means after the invoice has been due.
- **Functional Role:** The Functional Role assigned to this Reminder Schedule Rule. The Functional Contacts assigned to this Functional Role will receive the reminder.
- **Is Acknowledged Option:** The Reminder Detail will only process if the 'Is Acknowledged' setting on Invoice matches the selected option. The following options are available.
 - **Send if Acknowledged** - The reminder will be sent even if the Invoice has been acknowledged.
 - **Send if not Acknowledged** - The reminders will be sent if the Invoice has not been acknowledged.
 - **Send in Either Case** - The reminders will always be sent until paid.
- **Attachable Report:** Identifies the word template you may want to associate with the Reminder Schedule. When specified, this word template will be generated in context of the Invoice and attached to the email being sent. This is an optional field.
- **Email Template Title:** The title of the email template to use when the reminder is sent. This would be a template already created within Dynamics 365. You may create as many templates as you like. By default, Recurring Billing Manager includes two email templates to use with Reminders. The Email templates needs to be either global or on Invoice entity
 - Document Past Due Reminder
 - Upcoming Document Due Reminder
- **Send Email From Option:** Determines whether the email will come from a queue, owner or a user. Depending upon your choice the below fields will be unlocked.
 - **Send Email From User:** Allows you to choose a User from whom to send the email. The selected user must have given the permission” **Allow other Microsoft Dynamics 365 users to send email on your behalf “**
 - **Send Email From Queue:** Allows you to choose a Queue from which to send the email.
 - **Send Email From Owner:** Email will be sent from the owner of the record.
- **Send To Functional Role:** Drives the To line when generating an email for a Reminder Rule. The following options are available:
 - **Bill To Customer** – If this is selected then the Functional Contacts having the functional role for the Customer in the Bill To Customer of the Billing Schedule, will receive the email.
E.g.: If George of Alpine Ski House has functional Role BA and on the Reminder Rule if Functional Role selected is BA then the Email reminder will be sent to George.
 - **Ship To Customer** - If this is selected then the Functional Contacts having the functional role for the Customer in the Ship To Customer of the Billing Schedule, will receive the email.
- **Send Cc Functional Role:** Drives the Cc line when generating the email for a Reminder Schedule Rule. The following options are available:

Recurring Billing Manager – User Manual

- None – Nothing will be set in Cc while sending the email reminder
- Bill To Customer - If this is selected then the Functional Contacts having the functional role for the Customer in the Bill To Customer of the Billing Schedule, will receive the email.
- Ship To Customer - If this is selected then the Functional Contacts having the functional role for the Customer in the Ship To Customer of the Billing Schedule, will receive the email.

BA reminder

Reminder Rule

General Related

Reminder Rule Name *	BA reminder	Email Template Title *	Email invoice template
Reminder Schedule *	Email reminder	Send Email from Option *	Send from Owner
Days Before Due Count *	1	Send Email From User	---
Functional Role *	Manager	Send Email From Queue	---
Is Acknowledged Option *	Send in Either Case	Send To Functional Role *	Bill To Customer
Attachable Report	Invoice	Send CC Functional Role *	Ship To Customer

Configuration - Others

Attachable Reports

The Attachable Report entity allows users to select the Word template which can be used to generate Invoice and attach it to an email to be sent to the Customers

How to Create Attachable Reports:

- 1) Navigate to **Recurring Billing Manager App** → **Others** → **Attachable Reports** → Click on '+New'.

Recurring Billing Manager – User Manual

The screenshot shows the 'New Attachable Report' form. The left sidebar has 'Attachable Reports' selected. The form has a 'General' tab. The fields are:

Attachable Report Name *	---	Attachment Name Option *	Constant
Select Template *	---	Attachment Name *	---

A red error message is shown: **Required fields must be filled in.**

2) Enter the necessary fields.

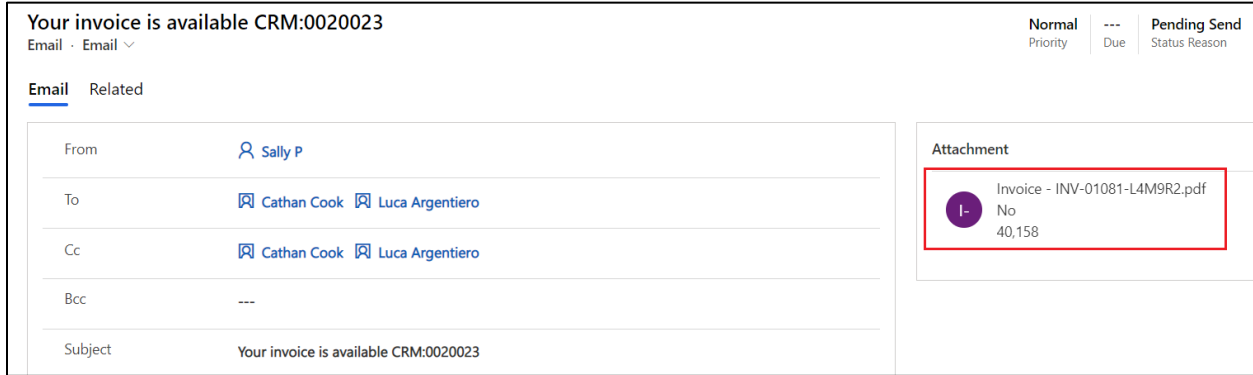
- **Attachable Report Name:** Any appropriate name for the Report.
- **Attachment Name Option:** Option to set the name of the output file to a Constant value or Dynamic value.
- **Select Template:** Select a template from the list of word template present in CRM.
- **Attachment Name:** If constant is selected for the Attachment Name Option then the value that is entered is given to the name of the Attachment. If it is Dynamic then value is replaced with the value of the field in correct Invoice context. Correct logical name of the field has to be entered in {} for dynamic option to work correctly.

The screenshot shows the 'Invoice' form. The 'Attachable Report' section is visible. The 'General' tab is selected. The fields are:

Attachable Report Name *	Invoice	Attachment Name Option *	Dynamic
Select Template *	Invoice	Attachment Name *	Invoice - {invoicnumber}

A red box highlights the 'Attachment Name' field.

The Invoice number is replaced in the Attachment as shown



Functional Contacts

The Functional Contact entity is used to create a contact and assign them to a Functional Role. A Functional Role may have multiple Functional Contacts and a Functional Contact may have multiple Functional Roles. The relationship between a role and a contact is housed in the Functional Contact.

Functional Contact	Functional Role
Alexa	Billing
Gunnar	Billing
Jane	Accounting
Gunnar	Accounting

In the example above, more than one person appears in the same Functional Role and the user Gunnar, belongs to more than one Functional Role. The construct of Functional Roles and Functional Contacts allow for many-to-many relationships with Contacts on Accounts.

How to Create Functional Contacts:

- 1) Go to **Recurring Billing Manager App** → **Others** → **Functional Contacts** → Click on '+New'.

Recurring Billing Manager – User Manual

Save Save & Close + New Flow

New Functional Contact

General

Functional Contact * Name	---	Customer *	---
Functional Role *	---	Contact *	---

2) Enter the required fields.

- **Functional Contact Name:** The name of the Functional Contact generated by the system made up of the Contact concatenated with the Functional Role and Account.
- **Customer:** Identifies the Customer associated with the Functional Contact. The Customer can be an Account or a Contact. When using Account, this is typically the Account to which the Contact belongs, but can be a different Account.
- **Functional Role:** Identifies the Functional Role to which this contact is linked.
- **Contact:** Identifies the Contact associated with the account that is selected in Customer.

3) Click on **Save**.

Cathan Cook Manager Alpine Ski House

Functional Contact

General Related

Functional Contact * Name	Cathan Cook Manager Alpine Ski House	Customer *	Alpine Ski House
Functional Role *	Manager	Contact *	Cathan Cook

Functional Roles

The Functional Role entity is used to create roles pertaining to business processes or business roles. Functional Contacts are assigned to a Functional Role. There may be multiple roles with one or multiple contacts assigned to each role.

When Reminder Schedules are generated, the system uses the Customer to look up Functional Contacts associated with that Account or Contact. It then filters to the Functional Role to determine to whom to send the reminder email.

How to Create Functional Roles:

- 1) Got to **Recurring Billing Manager App** → **Others** → **Functional Roles** → Click on **'+New'**.

The screenshot shows the 'New Functional Role' form. The left sidebar has a red box around the 'Functional Roles' menu item. The main form area has a 'General' tab and two input fields: 'Functional Role Name' (with a red asterisk) and 'Description'.




- 2) Enter the required fields.
 - **Functional Role Name:** Descriptive name of the Functional Role.
 - **Description:** Additional information to further define the Functional Role.
- 3) Click on **Save**.



The screenshot shows the 'BA' Functional Role form. The left sidebar has a red box around the 'Functional Roles' menu item. The main form area has a 'General' tab and two input fields: 'Functional Role Name' (with a red asterisk) and 'Description'.

Billing - Invoices

Recurring Billing Manager utilizes the Dynamics 365 Invoices entity to create Invoices from Billing Schedules.

The following fields were added to the Invoice entity to use with Recurring Billing Manager.

DATES	
Document Date ⁺	10/18/2020 
Date Delivered	--- 
Payment Terms	Net 30
Due Date	11/18/2020 

 Paid Amount	---
 Remaining Amount	---

Document Date: Date of the invoice. This will default as the next invoice date of billing schedule but may be changed.

Paid Amount: The amount that has been paid on the invoice.

Remaining Amount: The amount remaining to be applied to this invoice. This amount is updated when you use the workflow or dialog to pay an Invoice. Completely applied documents will have a Remaining Amount of \$0.00.

Payments:

To track the Payments made against the Invoice, there is an entity called Payment. Payment records can be created in 2 ways.

- 1) Payment record will be created on click of the Invoice Paid button. This payment record will have the record of the remaining payment to be made against that Invoice. Payment Method will be set to Others and Payment Method (Others) to Complete or partial (depends on the option you chose).

Alpine Ski House - October 19, 2020 3:15 PM Others

Payment

General Related

Customer	*	Alpine Ski House
Invoice		Alpine Ski House - October 19, 2020 3:15 PM
Payment Method	*	Others
Payment Method (Others)	*	Complete
Amount	*	₹41,578.00
Reference Number	+	---

2) To create Payment records manually

- a. Navigate to Sales Hub -> Invoices and select the Invoice against which you need to enter the payment details.
- b. Click on Payments tab. Click on New Payment and then enter the details related to the Payment
 - **Customer:** Customer for which the Invoice is billed. This field will be auto populated from the Invoice
 - **Invoice:** Invoice against which we need to make payment
 - **Payment Method:** There are different options in this field
 - Cash
 - Credit Card
 - Cheque
 - Others – On selection of this Payment Method (Others) field is visible where you can enter the other payment methods like Net Banking, Direct Transfer etc.
 - **Reference Number:** Reference number of the transaction

New Payment

General

Customer *	A. Datum
Invoice	Adventure Works - October 18, 2020
Payment Method *	--Select--
Amount *	--Select--
Reference Number +	Cash
	Credit Card
	Cheque
	Others

Recurring Billing Manager Tab

The Recurring Billing Manager tab displays the fields related to Recurring Billing Manager and provides additional information about the Invoice that was created from the Billing Schedule.

- **Ship To Customer:** The Customer associated with this Invoice. It may be different than the Customer who is receiving the invoice.
- **Next Billing Date:** Date of the next iteration of the Billing Schedule's Current Due Date once this invoice has been processed or paid.
- **Billing Schedule:** Identifies the Billing Schedule associated with the Invoice.
- **Is Acknowledged:** Determines if the Customer has recognized the invoice and intends to pay it.
- **Delayed Charge Schedule:** Identifies the Delayed Charge Schedule associated with the Invoice.
- **Delayed Charge Thru Date:** Identifies the date through which penalties have been assessed.
- **Reminder Schedule:** Identifies the Reminder Schedule that is associated with the Invoice.

Recurring Billing Manager – User Manual

Alpine Ski House - October 18, 2020 Invoice		₹34,567.00 Total Amount	Active Status	New Status Reason	Sally P Owner
Summary Payments Addresses Details Recurring Billing Related					
Ship To Customer	Alpine Ski House	Next Billing Date	10/20/2020		
Billing Schedule	Alpine Ski House Billing Schedule	Is Acknowledged	No		
Delayed Charge Schedule	Penalty	Delayed Charge Thru Date	11/19/2020		
Reminder Schedule	Email reminder				

Auto Process

Workflow Triggers

The Workflow Trigger entity is used to trigger timed workflows for running periodic processes.

How to Create Workflow Triggers:

- 1) Navigate to **Recurring Billing Manager App** → **Auto Process** → **Workflow Triggers** → Click on **'+New'**.

New Workflow Trigger

General

Workflow Trigger * --- Description ---

Name ---

Process Scheduling

Poll Interval * --- Interval ---

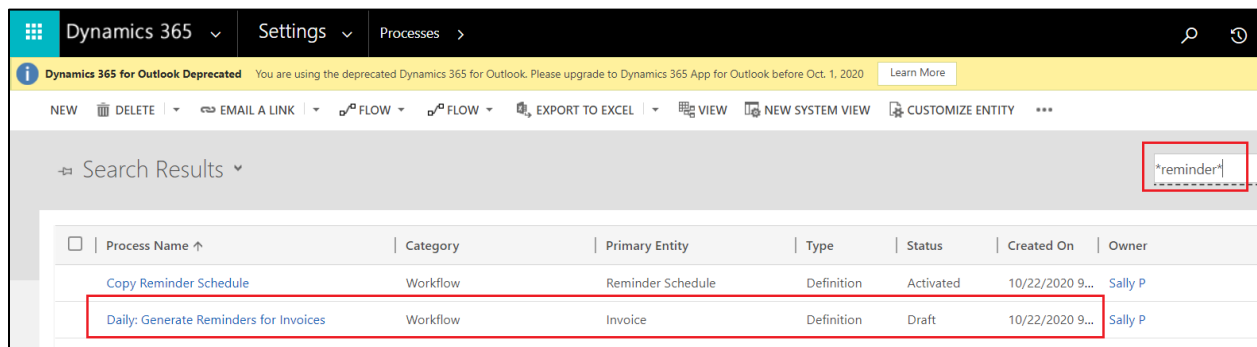
Workflow Options * --- Workflow Start Time * ---

- 2) Enter the necessary information.

- **Workflow Trigger Name:** Descriptive name of the Workflow Trigger.

Recurring Billing Manager – User Manual

- **Description:** A brief description explaining for what the Workflow Trigger will be used.
- **Poll Interval:** Determines the interval time between each workflow. The following list of options are available:
 - Only Once
 - X Day(s)
 - X Week(s)
 - X Month(s)
 - X Year(s)
- **Interval:** Defines the value of 'X' in the 'Poll Interval' field. It can be any numerical value, for e.g. 1, 3, 7.
- **Workflow Option:** Determines the workflow that is to be run for a defined period of time. The list contains pre-generated workflows that comes with Recurring Billing Manger solution.
 - **Auto Generate Invoice** – This will generate the Invoices automatically.
 - **Auto Generate Reminder** – This will generate email reminders for Overdue Invoices. Before using this workflow please make sure the workflow '**Daily:Generate Reminders for Invoices**' is activated. To activate the workflow, follow the steps given below:
 1. Click on the gear Icon.
 2. Open Advanced Settings.
 3. Navigate →Settings →Process.
 4. In the Search box type '***reminder***'.
 5. Select and open the workflow – '**Daily:Generate Reminders for Invoices**'.



6. Click on the '**Set properties**' of the Document template.

Recurring Billing Manager – User Manual

Process: Daily: Generate Reminders for Invoices

Information

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

General Administration Notes

Show Process Properties

Add Step | Insert | Delete this step.

- Check if a reminder should be generated
Inogic.RecurringBillingManager.Workflows (1.0.0.0):Inogic.RecurringBillingManager.Workflows.CheckReminderConditions Set Properties
- ✖ Check if a reminder should be generated
If Check if a reminder should be generated:Should Generate Reminder equals [True], then:
 - Check if a reminder should be generated
Inogic.RecurringBillingManager.Workflows (1.0.0.0):Inogic.RecurringBillingManager.Workflows.CreateEmailFromReminderRule
 - ✖ Check if a Document Template needs to be generated
If Check if a reminder should be generated:DocumentTemplateOutput (Document Template):Document Template Identifier cont
 - ✖ Generate the Word Template
Action: SetWordTemplate Entity: None (global) Set Properties
 - Convert the Document that was just created from a Docx to a PDF
Inogic.RecurringBillingManager.Workflows (1.0.0.0):Inogic.RecurringBillingManager.Workflows.ConvertAnnotationToPDF

7. Click on **Save & Close**.

Set Custom Step Input Properties - Microsoft Dynamics 365 - Google Chrome

octtrial20.crm8.dynamics.com/SFA/Workflow/customactivityform.aspx?workflowId=073a2213-2eff-4d88-b1fa-fca9691f2306...

File Save and Close Help

Process: Daily: Generate Reminders for Invoices

Set SETWORDTEMPLATE input properties

Working on solution: Default Solution

Property Name	Data Type	Required	Value
SelectedTemplate	Lookup	Required	{Document Template Identifier(Ch
Target	Lookup	Required	{Invoice(Invoice)}

Form Assistant

Dynamic Values

Dynamic Values

Operator:

Look for:

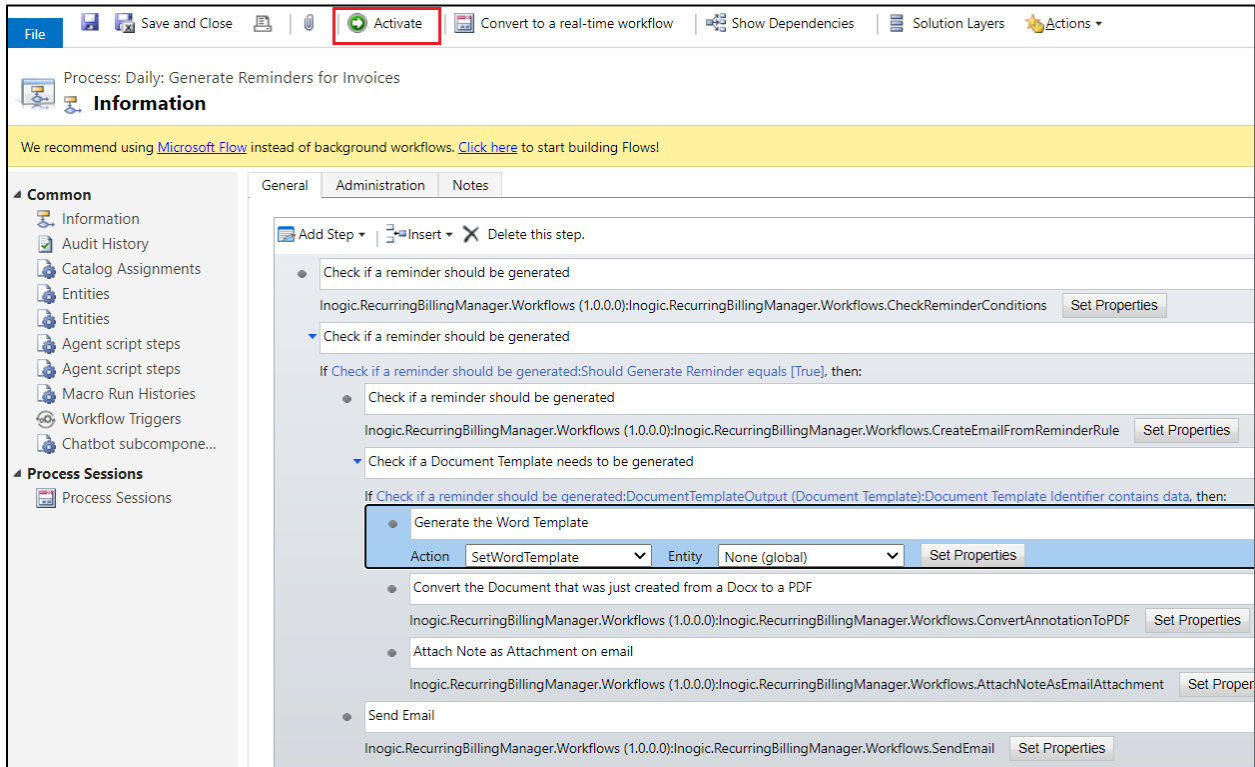
Invoice

Add

Default value:

OK

8. Click on the **Activate** button.



- **Auto Generate Penalty** – Use this if we need to leverage penalty on the Invoice if it is overdue.
- **Other** – You also have the option to create your own Workflows. For this, you have to select the **'Other'** option.
- **Workflow:** This field appears when **'Workflow Option'** is selected as **'Other'**. Here, you can add your own workflows. Workflow that can be added here needs to be defined on Workflow trigger entity only.
- **Workflow Start Time:** Determines the time when the workflow will be triggered.

3) Click on **Save**.

Invoice
Workflow Trigger

General Related

Workflow Trigger Name	* Invoice	Description	---
-----------------------	-----------	-------------	-----

Process Scheduling

Poll Interval	* X Day(s)	Interval	* 1
Workflow Options	* Auto Generate Invoice	Workflow Start Time	* 10/19/2020 4:15 PM

Synchronize Line from Billing Lines

The Billing Lines has an on-demand workflow to sync the products in Billing Lines with that of Invoice Lines. Any update in the Billing Line is sync to the Current Invoice Line.

To synchronize line from billing lines, follow the steps given below:

- Go to **Recurring Billing Manager App** → **Schedules** → Open a **Billing Schedule** → Go to **Billing Lines** tab → Select the **Billing Line**.

Litware, Inc. (sample) Billing Schedule
Billing Schedule

General **Billing Lines** Invoices Related

Price List * Office 365 USA (sample)

Product ↑ ↓	Is Billable? ↓	Purchase Date ↓	Paid Thru Date ↓
iphone	Yes	10/17/2020	11/17/2020

- Click on 'Flow' button on the ribbons → Select '**Synchronize Line from Billing Line**' Workflow.

Save Save & Close + New Deactivate Delete Refresh Assign Share Email a Link Flow Word Templates

iphone Litware, Inc. (sample)
Billing Line

General Related

Billing Line Name * iphone Litware, Inc. (sample)

Billing Schedule * Litware, Inc. (sample) Billing Schedule

Product Details

Product	* iphone	Is Billable?	* Yes
Quantity	1	Purchase Date	10/17/2020
Override Unit Price	\$500.00	Paid Thru Date	11/17/2020

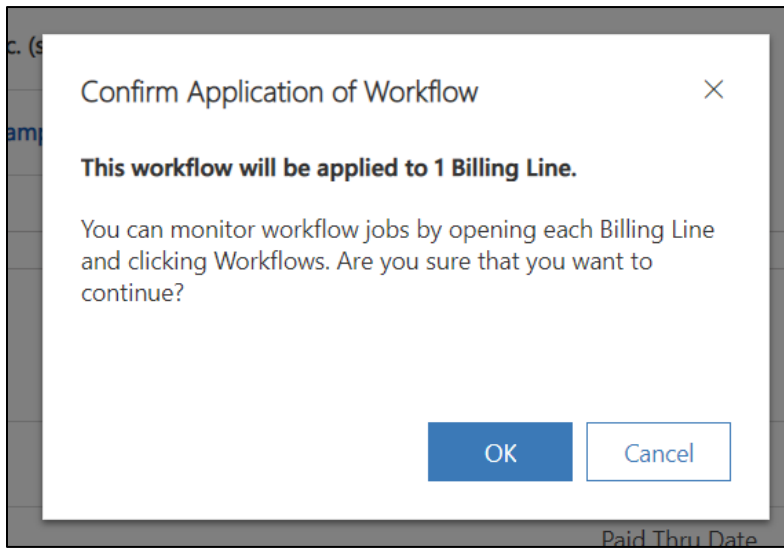
Manage

- Create a flow
- See your flows

Run Workflow

- Synchronize Line from Billi...**

- Click on **OK**.

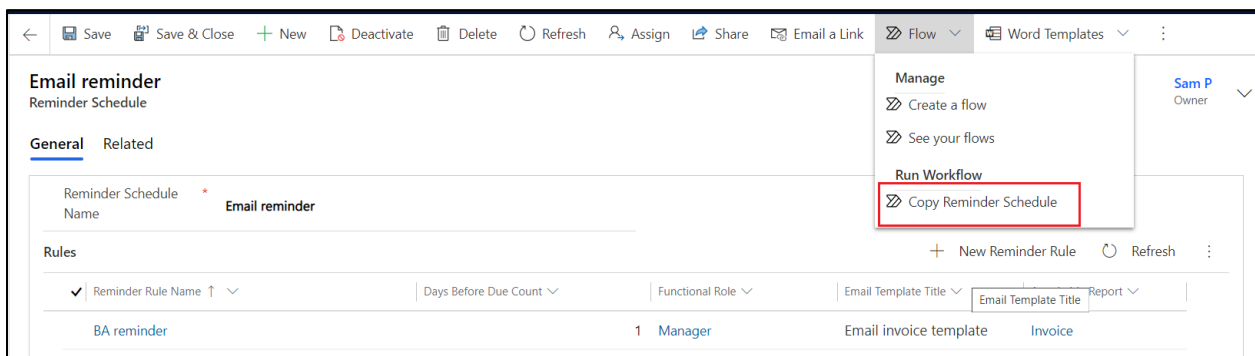


Copy Reminder Schedules

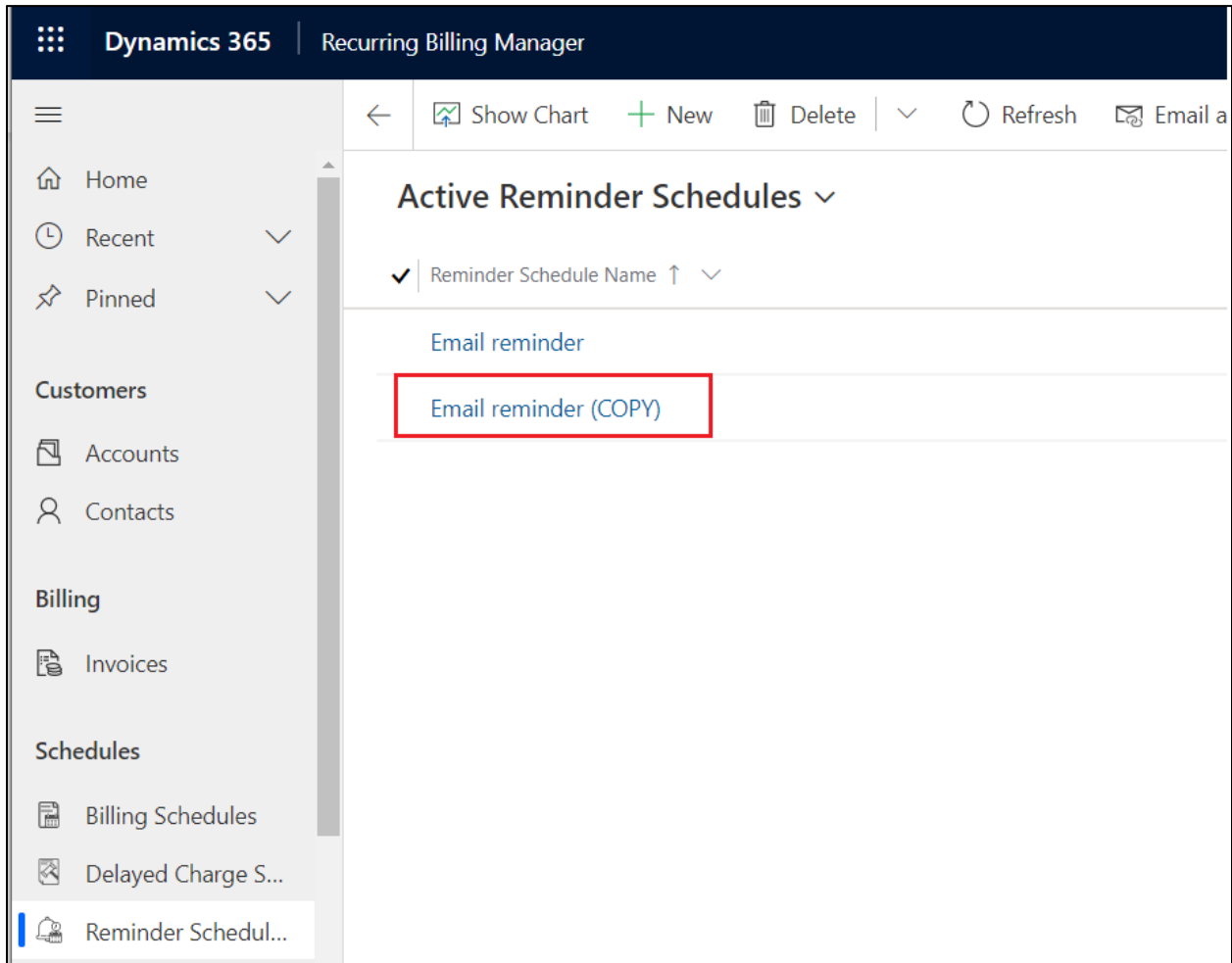
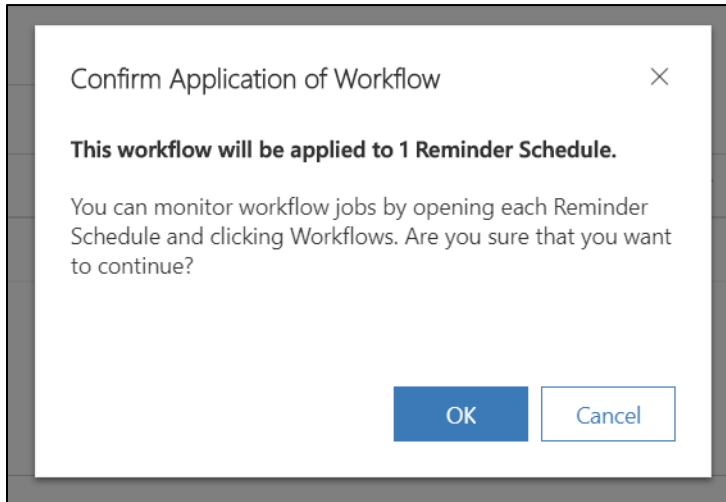
The Reminder Schedule has a Copy Reminder Schedule workflow available that can be run against an existing Reminder Schedule. When the workflow is run, it will create a new Reminder Schedule with the same name but with COPY appended to it. All Reminder Rules associated with the original Reminder Schedule will be copied to the new schedule.

To copy an existing workflow, follow the steps given below:

- Navigate to **Recurring Billing Manager App → Schedules → Reminder Schedule → Select the schedule you wish to copy.**
- Click on **'Flow'** button → Select **'Copy Reminder Schedule'** Workflow.



- Click on **OK**.



Contact Us

M/S. INOGIC TECH (INDIA) PVT. LTD.

A/301, Everest Nivara InfoTech Park,

TTC Industrial Area, MIDC, Turbhe

Navi Mumbai, Maharashtra 400705

INDIA

E-mail : crm@inogic.com

Skype : [crm@inogic.com](https://www.skype.com/people/inogic)

Twitter: @inogic