

Configure recurring payments and statutory features

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Recurring payments and statutory configuration

Overview

A recurring payment is a payment record that carries its payment details, dates, journal, and recurring-entry lines. A recurring template holds the journal and recurrence settings used for a recurring-payment setup.

If you need to...	Go to...
Check access to the accounting menus	Before you start
Reach an existing recurring payment or template	Find recurring-payment records and templates
Identify fields, entries, lists, and state controls	Understand the recurring-payment screens
Check which state or access rule applies	Configure access and handle state branches
Troubleshoot a wrong page, empty page, or expired session	When the recurring-payment surface does not open
Configure statutory electronic invoicing	Configure electronic invoicing and local reporting

Statutory configuration belongs on the mirrored electronic-invoicing page, not on this page.

Before you start

Prerequisites

- You have an account user or account manager role. Those groups control access to the recurring-payment menus.

- You are signed in with an active session before opening either list.

If **Recurring Payment** opens the settings page instead of the list, return to **Accounting**, open **Configuration**, and choose **Recurring Payment**. If the session-expired message appears, follow the steps in [When the recurring-payment surface does not open](#).

Find recurring-payment records and templates

A recurring-payment list is where you locate payment records; a recurring-template list is where you locate recurrence setups.

Prerequisites

You have the access described in [Before you start](#).

Steps

1. Open **Accounting**, then **Configuration**, and choose one destination from the table.

If you need to...	Choose...
Open payment records	Recurring Payment
Open recurrence setups	Recurring Template

Result: The selected recurring-payment list or recurring-template list is on screen.

Understand the recurring-payment screens

A recurring-payment screen combines record details with recurrence information and, for a payment record, a Recurring Entries area. A recurring-template screen groups the journal and recurrence settings used by that template.

Surface	What it contains
Recurring Payment	Payment details, dates, journal, recurrence information, and a description area
Recurring Entries	Entry rows and Create Payment

Surface	What it contains
Recurring Template	Journal and recurrence settings, company information, and a description area

The **Recurring Entries** area does not permit creating, deleting, or editing rows.

The state controls are **Done** and **Set To Draft** on a recurring payment, **Confirm** and **Set To Draft** on a recurring template, and **Create Payment** on a recurring-entry line.

Configure access and handle state branches

Use the record state shown by the status bar to determine which state control is available. The following branches apply:

What you need to do	Condition to check	Control
Complete a draft recurring payment	The payment is in draft	Done
Return a completed recurring payment to draft	The payment is done	Set To Draft
Create a payment from a recurring-entry line	The line is not done	Create Payment
Confirm a draft recurring template	The template is in draft	Confirm
Return a completed recurring template to draft	The template is done	Set To Draft

Prerequisites

You have an account user or account manager role, and the record is in the state required by the control you need.

Steps

1. Open the relevant record from its list.
2. Read the state in the status bar.
3. Select the control whose condition matches that state.

Result: The available state control matches the record state. If the list or control is not on screen, continue to [When the recurring-payment surface does not open](#).

When the recurring-payment surface does not open

Use this table when the page does not show the recurring-payment list or template list.

What you see	What it means	What to do
The browser lands on <code>/web</code> instead of the recurring-payment list.	The requested recurring-payment surface is not open.	Open Accounting , then Configuration , and choose Recurring Payment again.
The page is empty and no controls or buttons are visible.	The recurring-payment list is not on screen.	Return to the Accounting > Configuration menu and reopen the destination.
Sherkety ERP Session Expired	The session has expired.	Select Close , sign in again, and reopen the destination.
Your Sherkety ERP session expired. The current page is about to be refreshed.	The current page is being refreshed after session expiry.	Select Close , sign in again, and reopen the destination.

If the page shows **Menu Style**, **Font Type**, **Preloader Option**, **Theme Colors**, **Brand Color**, **Background Color**, **Sidebar Color**, or **Chatter Position**, you are on the settings page. The settings page also has **Save** and **Reset To Default**. Return to **Accounting**, open **Configuration**, and choose **Recurring Payment**.

Result: You know whether the requested recurring-payment surface was reached or which access, route, empty-page, or session condition stopped it.

Know what is next

Statutory configuration is covered in [Configure electronic invoicing and local reporting](#).

Result: Statutory work has a separate destination, and recurring-payment actions remain subject to the state and access conditions above.