

Compeat Help

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Create Invoice Templates

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Invoice templates save you and your team time when it comes to entering regularly occurring or common invoices, such as rent, uniforms, maintenance, and in some cases, food and beverage vendors.

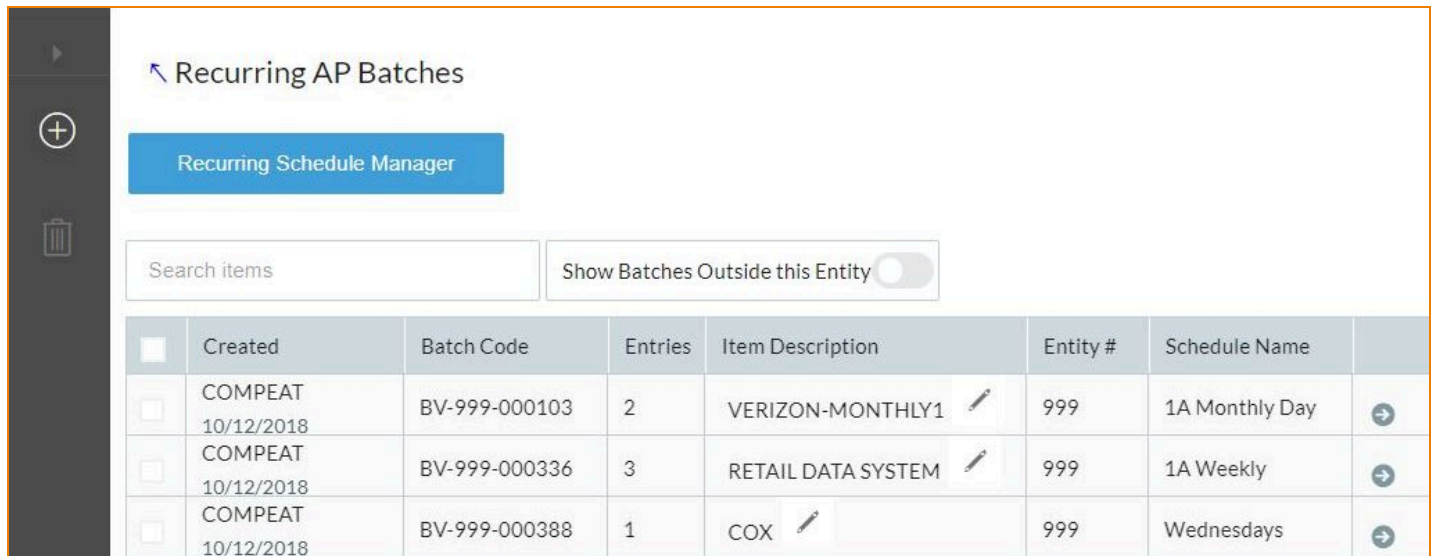
Incorporate templates in your workflow in two ways:







- » Use a template when **adding an invoice** to an AP batch.
- » Populate a **recurring AP batch** with templates.

Create Invoice Templates

If you've created invoices in Compeat before, then invoice templates will look familiar to you. The two processes are near identical.

To create an invoice template, navigate to **Accounts Payable > Recurring AP**.



	Created	Batch Code	Entries	Item Description	Entity #	Schedule Name	
<input type="checkbox"/>	COMPEAT 10/12/2018	BV-999-000103	2	VERIZON-MONTHLY1 	999	1A Monthly Day	
<input type="checkbox"/>	COMPEAT 10/12/2018	BV-999-000336	3	RETAIL DATA SYSTEM 	999	1A Weekly	
<input type="checkbox"/>	COMPEAT 10/12/2018	BV-999-000388	1	COX 	999	Wednesdays	

Just like standard invoices, invoice templates exist in a batch.

» **Plan to have invoices recur?** We recommend you put templates that share the same recurrence schedule in the same batch as you will assign the schedule at the batch level.

Learn more about scheduling recurring AP in our [Schedule Recurring AP](#) article.

» **Simply want to create invoice templates for later use?** If you wish to create templates that you can use when [creating an AP batch](#), then we recommend you create a batch to hold those templates.

We also recommend you give it a batch name that indicates the non-recurring/scheduled nature of the batch, such as *Non-Recurring Templates*.

Recurring AP Batches

Recurring Schedule Manager

Search items

Show Batches Outside this Entity

	Created	Batch Code	Entries	Item Description
<input type="checkbox"/>	Compeat 08/12/2019	BV-005-000017	1	Uniforms

To create a new batch, select the plus sign icon on the left side of the page. New batches appear with **New** in the *Created* column. Simply locate your new batch and select the batch details.

Compeat prompts you to name your batch. You can edit the name later, if desired, by selecting the pencil icon in the *Item Description* column.

Enter Invoice Template Details

From here, the process strongly resembles that of a standard invoice. The only difference is the absence of dates and optional amount.

Create Voucher Template

Template will appear in recurring batch BV-005-000017

Vendor Name	<input type="text" value="Vendor Name"/>
Doc Type	<input type="text" value="Select a Doc Type..."/>
Doc Amount Optional	<input type="text" value="Doc Amount"/>
Non-Disc Amt Optional	<input type="text" value="Non-Disc Amt"/>
Doc Notes Optional	<input type="text" value="Doc Notes"/>

» Dates

- » If you use a template in a standard batch, you will enter those dates at that time.
- » If you use templates in a recurring batch, dates generate based on the assigned recurrence schedule.

» Amount

- » For invoices with a **fixed amount**, such as rent, you can enter the amount.
- » For invoices with a **varied amount**, such as utilities or beverage order, you can enter the amount when you use the template or an invoice recurs.

Enter Template Line Item Details

You can enter line item details as you would in a standard invoice, but with a few exceptions:

- » **You do not need to enter item quantities.** When you create an invoice using the template, or when an invoice recurs from the template, you can enter item quantities at that time.
- » **You do not need to enter an amount.** We mentioned this earlier, but some recurring invoices may vary week to week, or month to month. While rent may be a fixed amount you

can define, invoices for utilities or landscaping may require you adjust the amount each time.

! Making a change?

Any changes you make to a journal entry or recurring journal entry that generated from a template only affects the generated entry—not the template. You must edit the template itself in order to make permanent changes.

Use a Template in an AP Batch

When you add an invoice to a standard AP batch, Compeat gives you three options: a blank invoice, convert an order, or convert from a recurring invoice.

Selecting *Convert From Recurring Invoice* presents you with a list of all available invoices templates for your current entity.

Choose a Recurring AP Invoice

This entry will appear in batch: BV-999-002337

Vendor Name	APINVOICES.Ven...	Voucher #	Invoice #	APINVOICES.Invo...	Batch Description
CITY OF SLIDELL - UTILITY SERVICES	CITYOFSL	V-999-0002818			CITY OF SLIDELL- UTILITY
CLECO POWER, LLC	CLECO	V-999-0002802	MONTH 2017		CLECO
COMCAST	COMCAST	V-999-0002819	COMCAST		COMCAST

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Select the template you wish to use, and then select **Next**. This takes you to the invoice where you can confirm or edit line item details.

Use Recurring AP Invoices

Just like with standard invoices, invoice templates live in a batch. How many invoice templates you choose to include in a batch depends on your operation and how you plan to schedule the recurring batch.

Interested in setting up recurring AP batches? Learn more in our [Recurring AP Batches](#) article.

Common Questions

You likely have additional questions about invoice templates. We answer some below, but if you don't see your question, feel free to [email us](#).

- ▼ **What if I need to make changes to my invoice template?**

Updated on March 9, 2021

Tagged: [efficiency](#) [invoice templates](#) [invoices](#) [recurring](#)

