Sage Intacct minI-uSER Guide

Recurring Payment Setup

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This guide includes instructions on how to setup a new recurring transaction well as processing payments against existing recurring transactions within Sage Intacct.

Navigate to **"Dashboard" > "Order Entry” > "Other Transaction Activity" > "Recurring Transactions"**

Steps:

1. Add a new recurring transaction by selecting **"Add"** in the top right-hand corner of the page.
2. For Document Type, select **"Sales Invoice"** and hit **"Apply".**

Graphical user interface

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1. Begin filling out the Sales Invoice as usual, selecting the Customer and Entries for the items.
2. Then at the top of the page move to the **"Payment Details"** tab.
   1. Select the Payment Method you would like to use.

Graphical user interface, application

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1. Proceed to the next tab **"Schedule".** 
   1. Select the frequency and start date.
2. Move to the **"Paya Integration"** tab and select **"Paya Auto Pay"** and choose your Account Vault from the drop down.

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1. After submitting, you can view the details of this invoice and see when the next execution date is set to occur.