3. Recurring Invoices

Staff procedures for creating, reviewing, and safely ending recurring invoices in HighLevel.

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Recurring Invoice Basics

Recurring Invoice Basics

A **recurring invoice** is a billing template that automatically generates invoices on a schedule.

Use a recurring invoice when the customer should receive repeated invoices, such as monthly or annual billing.

Recurring invoice vs. one-time invoice

Need	Use
Charge or bill the customer once	One-time invoice
Generate invoices repeatedly on a schedule	Recurring invoice

Recurring invoice vs. subscription

HighLevel also has **Subscriptions**. Subscriptions and recurring invoices are not the same feature.

This guide focuses on **Recurring Invoices** under **Payments → Invoices & Estimates**.

If the customer is on a subscription rather than a recurring invoice, use the subscription procedure or ask an administrator before changing anything.

What a recurring invoice controls

A recurring invoice can include customer, products or services, quantities and pricing, taxes where configured, frequency, start date, end condition, payment options, and optional auto-pay when

supported and configured.

Before creating one

Confirm:

1. you have the correct contact;
2. a recurring invoice does not already exist;
3. the product/service and amount are correct;
4. the billing frequency is correct;
5. the first billing date is correct.

Official reference

HighLevel — Create and Manage Recurring Invoices

Create a Recurring Invoice

Create a Recurring Invoice

Start the recurring invoice

1. Open **Payments**.
2. Select **Invoices & Estimates**.
3. Click **+ New**.
4. Select **New Recurring Invoice**.

Select the customer

Choose the correct customer/contact. Double-check the name and email address before continuing.

Add the product or service

Add the applicable Fort Adams product or service and verify description, quantity, price, and applicable tax settings.

Do not invent a new product or change standard pricing unless your role authorizes it.

Set the frequency

Choose how often the invoice should recur. Examples can include weekly, monthly, yearly, or a supported custom interval.

Set the start and end

Review the starting date carefully. Depending on the configured recurring invoice, the schedule may continue until manually ended, end after a defined number of occurrences, or end on a configured date.

Review before activation

Before finalizing the recurring invoice, verify customer, amount, product/service, frequency, start date, end condition, and payment method or auto-pay option if applicable.

> **The draft stage is the safest time to catch a billing mistake.**

HighLevel's current recurring-invoice documentation notes that active or scheduled recurring templates have restrictions on editing key billing details.

Official reference

HighLevel — Create and Manage Recurring Invoices

Recurring Invoice Statuses

Recurring Invoice Statuses

Recurring invoice templates can have different statuses.

Draft

The recurring invoice has been created but has not been activated. This is the best stage for reviewing and correcting products, prices, dates, and billing frequency.

Scheduled

The recurring invoice is set to begin in the future. Treat a scheduled template as committed billing. If something material is wrong, review the available actions before trying to modify it.

Active

The recurring invoice is currently generating invoices according to its schedule. To permanently stop future invoices, **end the recurring schedule**.

Canceled

The series will not generate additional invoices. It remains available for reference.

Completed

The recurring series reached its configured ending condition.

Important distinction

The status of the **recurring template** is different from the payment status of an individual invoice generated by that template.

A customer might have an active recurring schedule while one generated monthly invoice is still unpaid, paid, voided, or otherwise handled separately.

Official reference

HighLevel — Create and Manage Recurring Invoices

Review a Customer's Recurring Billing

Review a Customer's Recurring Billing

There are two useful starting points.

Start from the customer

Use this method when someone calls or emails and you already know who the customer is.

1. Go to **Contacts**.
2. Find and open the contact.
3. Open the **Payments** area on the contact record.
4. Review the available invoice, subscription, and transaction information.

Start from Payments

Use this method when you need to work from the billing list.

1. Open **Payments**.
2. Go to **Invoices & Estimates**.
3. Open the recurring-invoice area/tab.
4. Find the customer's recurring template.
5. Open it to review its details.

View history

HighLevel provides **View History** for recurring invoice templates. Use history to review invoices generated from the recurring schedule, including relevant invoice dates and payment status.

When investigating a billing question

Check all of the following before answering the customer:

- Is the recurring template active?
- What is the next scheduled billing occurrence?
- What invoices have already been generated?
- What is the status of the invoice in question?
- Is the customer actually on a recurring invoice, or on a subscription?

Official references

- HighLevel — Create and Manage Recurring Invoices
- HighLevel — Billing from the Contact Profile

End a Recurring Invoice

End a Recurring Invoice

Ending a recurring invoice stops **future invoices** from being generated by that recurring schedule. It does not erase invoices that were already generated.

End the recurring series

1. Go to **Payments → Invoices & Estimates**.
2. Open the recurring-invoice area.
3. Find the customer's active recurring schedule.
4. Open the **More Options (⋮)** menu.
5. Select **End** or **End Recurring Invoice**.
6. Confirm that you selected the correct customer and schedule before completing the action.

Important: voiding one invoice does not end the series

Voiding or canceling a single generated invoice affects that invoice. It does **not** automatically stop the underlying recurring schedule.

If the customer should no longer receive future recurring invoices, make sure the **recurring schedule itself is ended**.

Before ending

Confirm customer identity, which recurring series is being ended, whether the customer has more than one recurring series, and whether there are outstanding invoices that still need attention.

After ending

Review the recurring list or template to verify that it is no longer active. Leave a note on the customer record if Fort Adams procedure requires context about why billing was stopped.

Official reference

HighLevel — Create and Manage Recurring Invoices

Changing an Existing Recurring Invoice

Changing an Existing Recurring Invoice

Billing changes deserve extra care. Examples include changing the amount, product/service, billing frequency, billing start/end, or replacing an old recurring arrangement with a new one.

First check the status

If the recurring invoice is still a **Draft**, make the correction before activation.

For **Active** or **Scheduled** recurring templates, HighLevel's current recurring-invoice documentation places restrictions on editing key billing details.

Safe staff procedure

When a material change is needed:

1. Review the current recurring template.
2. Review the history so you understand what has already been generated.
3. Confirm the customer's requested new terms.
4. If your permissions and Fort Adams procedure allow it, end the old series at the appropriate point.
5. Create or clone a new recurring invoice with the corrected terms.
6. Carefully verify the new start date to avoid duplicate billing or a billing gap.
7. Confirm the old recurring series is no longer active when it should have ended.

If you are uncertain, stop and ask an administrator before making the change.

Never “fix” billing by guessing

Do not change an amount, billing date, tax, product, or payment option based on an assumption. Billing changes should come from an authorized Fort Adams instruction or a clearly documented customer arrangement.

Official reference

HighLevel — Create and Manage Recurring Invoices

Auto-Pay and Payment Methods

Auto-Pay and Payment Methods

Some recurring invoices can use **Auto-Pay**, depending on the payment-provider setup and the customer's available payment method.

What Auto-Pay does

When configured, Auto-Pay can charge the selected saved/provided card when the recurring invoice becomes due.

Before relying on Auto-Pay

Verify that Auto-Pay is actually enabled for the recurring template, a valid payment method is available, and the next scheduled occurrence is correct.

If a payment fails

Do not assume the recurring schedule itself is broken. A failed charge can be related to the customer's payment method or payment provider while the recurring schedule remains active.

Review the generated invoice, payment/transaction status, recurring-template status, and available customer payment method information.

Follow the approved Fort Adams payment-failure procedure or escalate when necessary.

Do not collect card numbers in notes

Never place full payment-card numbers, security codes, passwords, or other credentials in CRM notes. Use the approved HighLevel/payment-provider flow for payment information.

Official reference

HighLevel — Auto Payments for Recurring Invoices