Auto-Pay and Payment Methods

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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

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