Changing an Existing Recurring Invoice

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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 Confirm the old recurring series is no longer active when it should have ended.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

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