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

Revision #1
Created 2026-09-22 14:24:35 UTC by David Prata
Updated 2026-09-22 14:24:35 UTC by David Prata