Customer Calls About a Recurring Invoice

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Use this workflow before making any billing change.

1. Find the customer

Open **Contacts** and confirm the customer's identity.

2. Review billing

Open the contact's **Payments** information and/or the recurring-invoice list.

3. Identify the billing mechanism

Confirm whether the customer has a recurring invoice, a subscription, or only a one-time invoice. Do not treat these as interchangeable.

4. Review history

Check recurring-template status, invoices already generated, invoice/payment status, and next scheduled billing occurrence where available.

5. Understand the customer's request

Examples include: “Why did I receive this invoice?”, “Please stop future invoices.”, “My card failed.”, “The amount should change.”, or “I need a copy of the invoice.”

6. Take only the action required

Do not end a recurring series merely because one payment failed. Do not void a single invoice when the customer's actual request is to permanently stop future recurring billing.

7. Record useful context

If the situation could matter to another staff member, add a concise note or task to the contact record.

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