Quick Reference

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Find a customer

Contacts → Search → Open contact

Search by name, email, or phone.

Add a customer

Contacts → + Add Contact

Search first to avoid duplicates.

Update a customer

Open contact → edit the applicable field → confirm the auto-saved value.

Add an internal note

Open contact → **Notes** → add a concise factual note.

Create a recurring invoice

Payments → Invoices & Estimates → + New → New Recurring Invoice

Verify customer, product, amount, frequency, and start date before activation.

Review recurring billing

Open the customer → **Payments**, or:

Payments → Invoices & Estimates → Recurring

Stop future recurring invoices

Find the recurring schedule → ⋮ → **End**

Remember: voiding one generated invoice does **not** end the recurring series.

Something looks wrong

Do not guess. Record what you found and ask an administrator.

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