Review a Customer's Recurring Billing

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There are two useful starting points.

Start from the customer

Use this method when someone calls or emails and you already know who the customer is.

1. Go to **Contacts**.
2. Find and open the contact.
3. Open the **Payments** area on the contact record.
4. Review the available invoice, subscription, and transaction information.

Start from Payments

Use this method when you need to work from the billing list.

1. Open **Payments**.
2. Go to **Invoices & Estimates**.
3. Open the recurring-invoice area/tab.
4. Find the customer's recurring template.
5. Open it to review its details.

View history

HighLevel provides **View History** for recurring invoice templates. Use history to review invoices generated from the recurring schedule, including relevant invoice dates and payment status.

When investigating a billing question

Check all of the following before answering the customer:

- Is the recurring template active?
- What is the next scheduled billing occurrence?
- What invoices have already been generated?
- What is the status of the invoice in question?
- Is the customer actually on a recurring invoice, or on a subscription?

Official references

- HighLevel — Create and Manage Recurring Invoices
- HighLevel — Billing from the Contact Profile

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