

CITK

How to create recurring Invoices



How to create recurring Invoices

You may have heard of the term “recurring billing/invoicing.” It is a way for your customers to pay you automatically without having to manually enter their payment details every time they buy something from you.

This can be very useful if you sell products on a subscription basis; you may want to send them an invoice every month or so for the amount due in advance.

This article will show you how to set up and use a simple recurring invoice.

What is a recurring invoice?

A recurring invoice can be scheduled in advance to send automatically to your customers who bought a recurring service/product. You want to schedule the invoices once and forget it! You!

Please Note:

We recommend using Stripe Connect with Invoices, in the event you do not wish to use Stripe Connect payments would need to manually rec

How to create a recurring invoice?

- Open the "Invoices" tab under the payments section.
- Select "New Recurring Template" by clicking New on the All Invoices or Recurring Templates page.

Understanding Setting invoice frequency.

The below table explains different cases of setting invoice frequency:

Frequency Settings

How often?

Daily ▾

of every

2

days

Start Date

📅 July 5, 2022

End


Never ▾

⚙️ First invoice will be due on July 5, 2022 and will be sent on July 5, 2022

How to create recurring Invoices

Frequency Settings

How often?

Daily  of every 2 days

Start Date


End

 July 5, 2022 By   July 13, 2022

 First invoice will be due on July 5, 2022 and will be sent on July 5, 2022


Frequency Settings


How often?

Daily  of every 2 days

Start Date

End

 July 5, 2022 By   July 12, 2022

 First invoice will be due on July 5, 2022 and will be sent on July 5, 2022

How to create recurring Invoices

Frequency Settings

How often?

Weekly ▾

on

Monday ▾

of every

2

weeks

Start Date

End

 July 5, 2022

Never ▾

Send invoice

2

days in advance

💡 First invoice will be due on July 18, 2022 and will be sent on July 16, 2022

Frequency Settings

How often?

Monthly ▾

on

Date ▾

2nd ▾

of every

2

months

Start Date

End

 July 6, 2022

After ▾

3

occurrences

Send invoice

0

days in advance

💡 First invoice will be due on September 2, 2022 and will be sent on September 2, 2022

How to create recurring Invoices

Frequency Settings

How often?

Monthly ▾

on

Date ▾

2nd ▾

of every

2

months

Start Date

End

 August 2, 2022

After ▾

3

occurrences

Send invoice

0

days in advance

 First invoice will be due on August 2, 2022 and will be sent on August 2, 2022

Frequency Settings

How often?

Monthly ▾

on

First ▾

Monday ▾

of every

1

month

Start Date

End

 August 1, 2022

By ▾

 December 31, 2022

Send invoice

1

days in advance

 First invoice will be due on August 1, 2022 and will be sent on July 31, 2022

How to create recurring Invoices

Frequency Settings

How often?

Yearly on last December of every 1 year

Start Date

End

August 1, 2022 After 5 occurrences

Send invoice 0 days in advance

💡 First invoice will be due on December 31, 2022 and will be sent on December 31, 2022

- The first invoice will be due on July 5, 2022
- The second invoice will be due on July 7, 2022
- Invoice generation would never stop automatically

- The first invoice will be due on July 5, 2022
- The second invoice will be due on July 7, 2022
- The subsequent invoices would be due on the 9th, 11th, and 13th of July

- The first invoice will be due on July 5, 2022
- The second invoice will be due on July 7, 2022
- The subsequent invoices would be due on the 9th, and 11th of July
- No invoice will be due on July 12

How to create recurring Invoices

-
- July 5, 2022, is a Tuesday for reference
 - The first invoice will be due on July 18 but has to be sent two days in advance, i.e., July 16, 2022 i.e.
 - The second invoice will be due on August 1, 2022, but will be sent two days in advance, i.e., July 30, 2022. i.e.
 - Had July 5 been a Monday, the first invoice would be due on the same date, i.e., July 5, 2022, and would have been sent immediately. have been
 - The second invoice would be due on July 19 and sent out two days in advance, i.e., July 17, 2022 i.e.
-

- The first invoice will be due on September 2 and would be sent 0 days in advance, i.e., on the same date.
 - The second invoice would be due on November 2 and sent to the customer on the same day.
 - The scheduling will be complete after sending out three invoices to the customer as specified in the settings.
-

- If, in the above example, we want to send the first invoice starting from the next month itself but at an interval of 2 months only
 - Simply selecting the start date as August 2 would work for the required logic.
 - The scheduling will be complete after sending out three invoices to the customer as specified in the settings.
-

- Settings provide a solution if we want to send out the invoice to the customer on the first Monday of every month starting from the next month.
 - The first invoice will be due on August 1 itself, given that August 1 is the first Monday in August.
 - The invoices will be sent one day in advance.
 - The logic also helps us end the process after the end of the year. This means the last invoice will be due on December 5, the first Monday of December.
 - No further invoices will be due for the customer after December 5.
-

- This frequency setting would allow us to send an invoice to the customer on the last date of December every year, i.e., December 31
 - Invoice scheduling will end after sending out five invoices to the customer.
-

Status and action types in recurring templates.

Action / Status -->	Draft	Active	Scheduled	Canceled	Completed
Edit	Yes	No	No	No	No
View	No	Yes	Yes	Yes	Yes
Delete	Yes	No	Yes	No*	No*
End	NA	Yes	Yes	NA	NA

Please Note:

Cancelled and **Completed** invoices can be deleted only if no invoice has been sent out to the customer. **Deleted** recurring templates are not shown.

View sent invoices and their payment status.

Users can click on Details as shown below to know the invoices sent and their status, which will open the invoices sent and their status as shown in the right panel.

How to create recurring Invoices

Payments

Invoices

Orders

Transactions

Products

Tax Settings

Integrations

A

Recurring Invoices

Status

Search

+

New

INVOICE NAME	CUSTOMER	LAST ISSUED ON	RECURRING FREQUENCY	AMOUNT	STATUS	
Phone invoice for Adam Details	Adam Jenson adamjens@gmail.com (706) 680-6212	April 28, 2022	Every 2 Months (Never ends)	\$8,870.00	Active	Action
New recurring invoice Details	Adam Jenson adamjens@gmail.com (706) 680-6212	April 28, 2022	Every 2 Months (1 remaining)	\$299.00	Draft	Action
Domestic services, Jan Details	Conor McDonut Conormc@gmail.com (706) 680-6212	April 28, 2022	Every 2 Months (Never ends)	\$1,998.00	Completed	Action
Domestic services, Jan 2021 Details	Conor McDonut Conormc@gmail.com (706) 680-6212	April 28, 2022	Every 2 Months (Never ends)	\$0.00	Cancelled	Action

Showing 1 to 4 of 4 results

Previous

Next

How to create recurring Invoices

The screenshot displays the 'Recurring Invoices' section of a software interface. The top navigation bar includes 'Payments', 'Invoices' (selected), 'Orders', 'Transactions', 'Products', and 'Tax Settings'. Below the navigation, there's a 'Recurring Invoices' header with a 'Status' dropdown and a 'Search' button. A table lists four invoices with columns for 'INVOICE NAME', 'CUSTOMER', 'LAST ISSUED ON', and 'RECURRING'. The right panel, titled 'Invoice Details', shows the 'Invoice payment history' for the selected invoice, listing dates and amounts from May 2021 to March 2022.

INVOICE NAME	CUSTOMER	LAST ISSUED ON	RECURRING
Phone invoice for Adam Details	Adam Jenson adamjens@gmail.com (706) 680-6212	April 28, 2022	Every 2 Mo (Never ends)
New recurring invoice Details	Adam Jenson adamjens@gmail.com (706) 680-6212	April 28, 2022	Every 2 Mo (1 remaining)
Domestic services, Jan Details	Conor McDonut Conormc@gmail.com (706) 680-6212	April 28, 2022	Every 2 Mo (Never ends)
Domestic services, Jan 2021 Details	Conor McDonut Conormc@gmail.com (706) 680-6212	April 28, 2022	Every 2 Mo (Never ends)

Showing 1 to 4 of 4 results

March 03, 2021	\$12,990.00	View invoice
January 03, 2021	\$12,990.00	View invoice
November 03, 2021	\$12,990.00	View invoice
September 03, 2021	\$12,990.00	View invoice
July 03, 2021	\$12,990.00	View invoice
May 03, 2021	\$12,990.00	View invoice

There can be **four types** of invoices status possible here, which will also be shown in the form of tooltips above the icons:

- **Sent:** The invoice was successfully sent to the customer
- **Overdue:** The invoice was successfully sent on time but has still not been paid by the customer
- **Paid:** The customer has paid for the invoice
- **Not Sent:** There was a system error in delivering the invoice to the customer, and the invoice needs to be sent again.

The invoice statuses can also be checked inside the invoice builder once the recurring template is **Scheduled**, which will open the right panel similarly.

How to create recurring Invoices

[Back](#)

New Recurring Template

Recurring every 2 minutes

Frequency Settings

How often?

Minutely ▼ of every minutes

Start Date

📅

July 6, 2022

01:04 PM

End


After ▼

10

occurrences

Show invoice history

Recurring Template



Fitness Center

077920 05477

IN

FAQ

What is being shown in the list view?

The list shown on the Recurring Templates page represents the recurring templates created by the user, which are creating and sending individual invoices to the defined customer as per the frequency settings defined in them individually.

For simplicity, the list shows the parent invoice creator, which creates and sends out invoices per the frequency settings and customer details specified inside them. sends

How can I get notified upon receiving payment on the invoice?

How to create recurring Invoices :

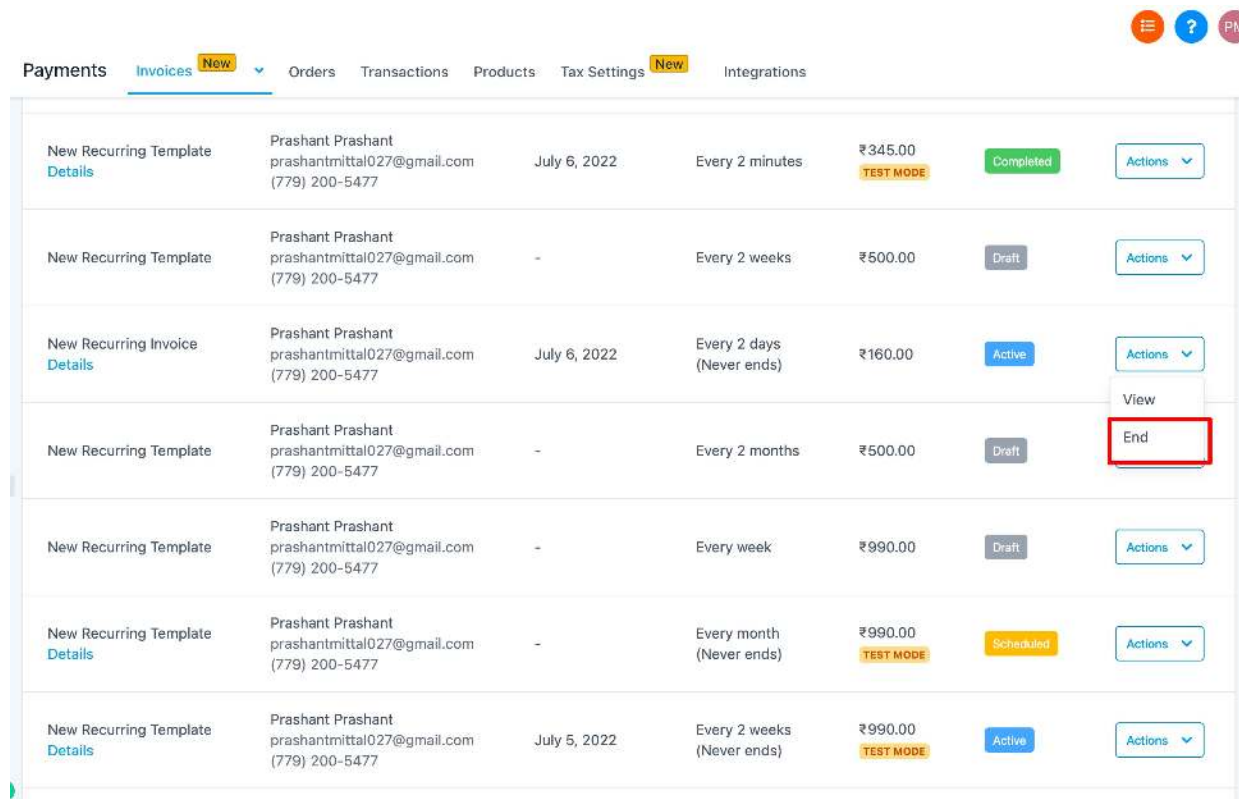
How to create recurring Invoices

The table below shows the default notifications sent to the sender and receiver. The location user can create more such automation based on the invoice status(sent/paid) using invoice triggers in workflows.

Case Who should receive the email?
Invoice payment successful Receiver
Invoice payment failed Receiver
Invoice received Receiver
Invoice payment successful Sender
Invoice payment failed Sender

How to stop sending future invoices?

Active or Scheduled recurring invoices can be stopped from sending out any future invoices from the Recurring Templates list page. Select the End option from the Actions dropdown and confirm the same as shown below:



Payments	Invoices New	Orders	Transactions	Products	Tax Settings New	Integrations
New Recurring Template Details	Prashant Prashant prashantmittal027@gmail.com (779) 200-5477	July 6, 2022	Every 2 minutes	₹345.00 TEST MODE	Completed	Actions ▼
New Recurring Template	Prashant Prashant prashantmittal027@gmail.com (779) 200-5477	-	Every 2 weeks	₹500.00	Draft	Actions ▼
New Recurring Invoice Details	Prashant Prashant prashantmittal027@gmail.com (779) 200-5477	July 6, 2022	Every 2 days (Never ends)	₹160.00	Active	Actions ▼
New Recurring Template	Prashant Prashant prashantmittal027@gmail.com (779) 200-5477	-	Every 2 months	₹500.00	Draft	View End
New Recurring Template	Prashant Prashant prashantmittal027@gmail.com (779) 200-5477	-	Every week	₹990.00	Draft	Actions ▼
New Recurring Template Details	Prashant Prashant prashantmittal027@gmail.com (779) 200-5477	-	Every month (Never ends)	₹990.00 TEST MODE	Scheduled	Actions ▼
New Recurring Template Details	Prashant Prashant prashantmittal027@gmail.com (779) 200-5477	July 5, 2022	Every 2 weeks (Never ends)	₹990.00 TEST MODE	Active	Actions ▼

How to create recurring Invoices

Payments **Invoices** New Orders Transactions Products Tax Settings New Integrations

Template Name	Customer	Start Date	Frequency	Amount	Status	Actions
New Recurring Template Details	Prashant Prashant, prashantmittal027@gmail.com (779) 200-5477	July 6, 2022	Every 2 minutes	₹345.00	Completed	Actions
New Recurring Template	Prashant Prashant, prashantmittal027@gmail.com (779) 200-5477	-	Every 2 weeks	₹600.00	Draft	Actions
New Recurring Invoice Details	Prashant Prashant, prashantmittal027@gmail.com (779) 200-5477	-	-	-	Active	Actions
New Recurring Template	Prashant Prashant, prashantmittal027@gmail.com (779) 200-5477	-	-	-	Draft	View, End
New Recurring Template	Prashant Prashant, prashantmittal027@gmail.com (779) 200-5477	-	-	-	Draft	Actions
New Recurring Template Details	Prashant Prashant, prashantmittal027@gmail.com (779) 200-5477	-	Every month (Never ends)	₹990.00	Scheduled	Actions
New Recurring Template Details	Prashant Prashant, prashantmittal027@gmail.com (779) 200-5477	July 5, 2022	Every 2 weeks (Never ends)	₹990.00	Active	Actions

The user also has the option to end the recurring invoice from inside the invoice builder.

Back New Recurring Template Recurring every month Save Schedule

Frequency Settings

How often?
Monthly on Date 5th of every 1 month

Start Date End
July 6, 2022 Never

Send invoice 0 days in advance

First invoice will be due on August 5, 2022 and will be sent on August 5, 2022

Show invoice history

Recurring Template

Fitness Center
077900 05477

Can I modify the price, discount, or taxes from the following occurrence?

No, you can't change the price, discount, or taxes after you have scheduled the recurring invoice.

Although you can individually edit the sent-out invoice and send it over again to the customer for specific instances, there is no way to change this in automation.

Can I change the frequency setting of an ongoing recurring invoice?

No, you can't change the frequency settings after you have scheduled the recurring invoice.

Which products can I add to recurring invoices?

Only one-time products (NOT subscriptions) can be added to a recurring invoice. In the case of recurring products, the

frequency needs

to be defined inside the invoice frequency setting.