

# 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.

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# 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:

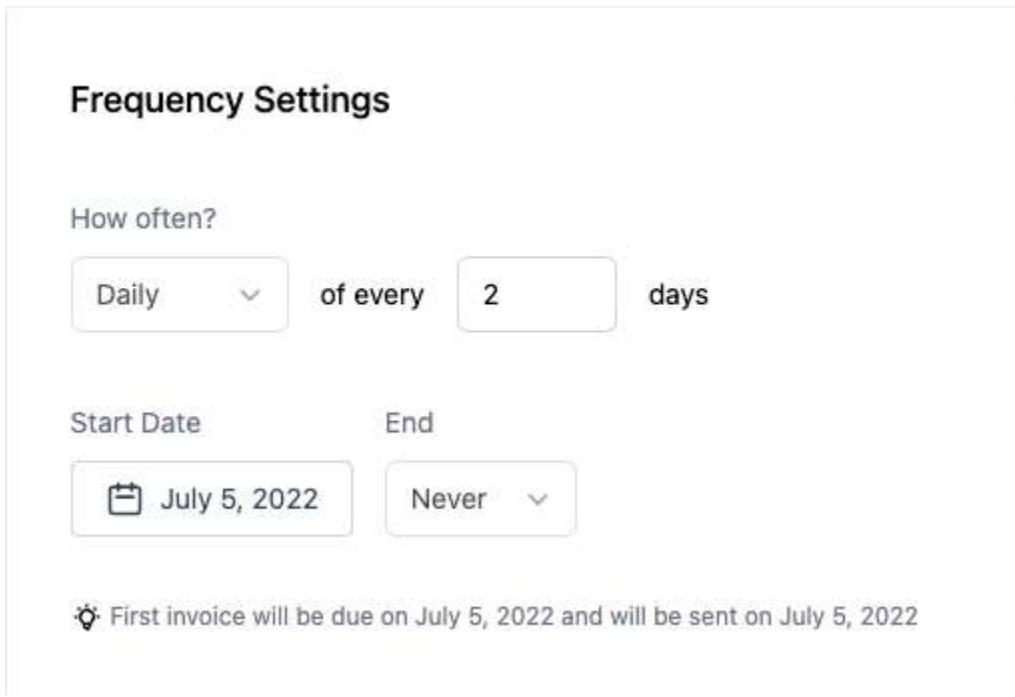
We recommend using Stripe Connect with Invoices, in the event you do not wish to use Stripe Connect payments would need to manually re

# 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  2nd  of every  months

Start Date

End

August 2, 2022  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  Monday  of every  month

Start Date

End

August 1, 2022  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  December  of every  year

Start Date

End

August 1, 2022  5"/> occurrences

Send invoice  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

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- 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, 2022i.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, 2022i.e.

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- 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.

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- 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.

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- 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.

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- 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

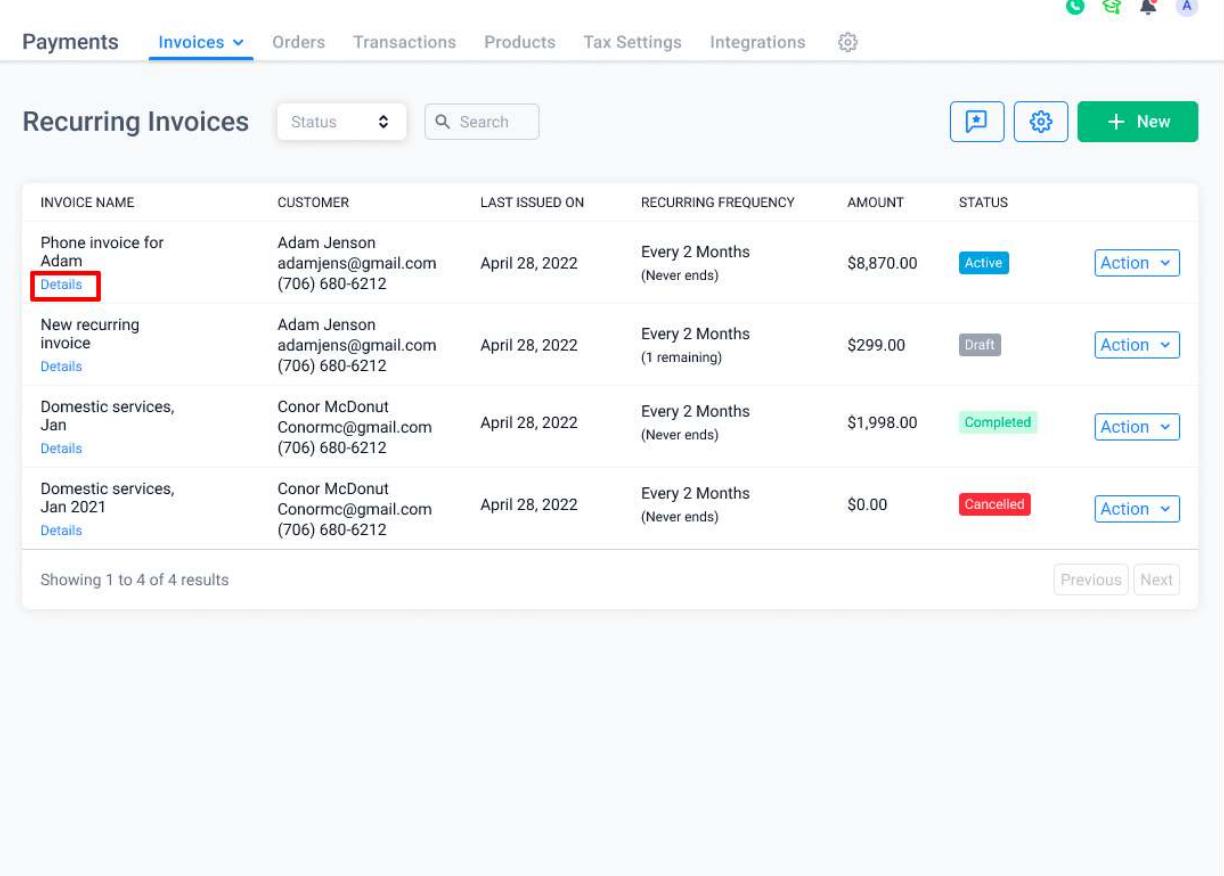
### Please Note:

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

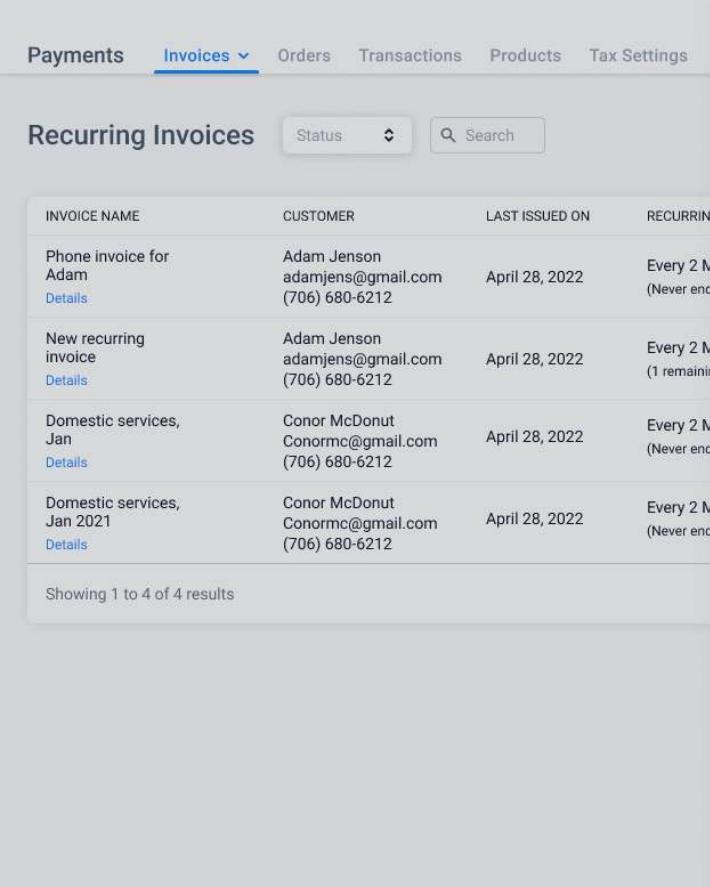


The screenshot shows a software interface for managing invoices. The top navigation bar includes 'Payments', 'Invoices' (which is the active tab, indicated by a blue underline), 'Orders', 'Transactions', 'Products', 'Tax Settings', 'Integrations', and a gear icon. On the right side of the top bar are icons for a phone, a graduation cap, a bell, and a user profile. The main content area is titled 'Recurring Invoices'. It features a search bar with 'Status' and 'Search' fields, and three buttons: a blue one with a star, a blue one with a gear, and a green one with a '+' and 'New'. Below this is a table with the following columns: INVOICE NAME, CUSTOMER, LAST ISSUED ON, RECURRING FREQUENCY, AMOUNT, and STATUS. The table contains four rows of data. The first row, for a 'Phone invoice for Adam', has its 'Details' link highlighted with a red box. The second row, for a 'New recurring invoice', is in 'Draft' status. The third row, for 'Domestic services, Jan', is 'Completed'. The fourth row, for 'Domestic services, Jan 2021', is 'Cancelled'. At the bottom of the table, it says 'Showing 1 to 4 of 4 results' and has 'Previous' and 'Next' buttons.

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

How to create recurring Invoices :

## How to create recurring Invoices



The screenshot shows a software interface for managing invoices. At the top, there are tabs for 'Payments', 'Invoices' (which is selected and highlighted in blue), 'Orders', 'Transactions', 'Products', and 'Tax Settings'. Below the tabs, there is a search bar with a 'Status' dropdown and a 'Search' button. The main area is titled 'Recurring Invoices' and displays a table with four rows of data. The columns are 'INVOICE NAME', 'CUSTOMER', 'LAST ISSUED ON', and 'RECURRING'. The first row is for a 'Phone invoice for Adam' with details: Adam Jenson, adamjens@gmail.com, (706) 680-6212, issued on April 28, 2022, recurring every 2 months (Never ends). The second row is for a 'New recurring invoice' with similar details. The third and fourth rows are for 'Domestic services, Jan' and 'Domestic services, Jan 2021' respectively, both with the same customer and issuance details. Below the table, it says 'Showing 1 to 4 of 4 results'. To the right of the main area, a modal window titled 'Invoice Details' is open, showing 'Invoice payment history' with a note '(Next due on 3 May, 2022)'. It lists six payment entries with columns for 'DATE', 'AMOUNT', and 'STATUS'. The entries are: March 03, 2021 (\$12,990.00, Sent); January 03, 2021 (\$12,990.00, Overdue); November 03, 2021 (\$12,990.00, Paid); September 03, 2021 (\$12,990.00, Paid); July 03, 2021 (\$12,990.00, Paid); and May 03, 2021 (\$12,990.00, Not Sent). Each entry has a 'View invoice' button with a tooltip icon.

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

Showing 1 to 4 of 4 results

### Invoice Details

Invoice payment history  
(Next due on 3 May, 2022)

DATE	AMOUNT	STATUS
March 03, 2021	\$12,990.00	 <a href="#">View invoice</a>
January 03, 2021	\$12,990.00	 <a href="#">View invoice</a>
November 03, 2021	\$12,990.00	 <a href="#">View invoice</a>
September 03, 2021	\$12,990.00	 <a href="#">View invoice</a>
July 03, 2021	\$12,990.00	 <a href="#">View invoice</a>
May 03, 2021	\$12,990.00	 <a href="#">View invoice</a>

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

The screenshot shows a software interface for creating a recurring template. At the top, there are buttons for 'Back', 'New Recurring Template', and 'Recurring every 2 minutes'. The main section is titled 'Frequency Settings' and includes fields for 'How often?' (set to 'Minutely' every 2 minutes), 'Start Date' (July 6, 2022, at 01:04 PM), and 'End' (After 10 occurrences). A red box highlights the 'Show invoice history' button. Below this is a preview section titled 'Recurring Template' showing a logo of a stylized 'a' with an orange swoosh, and contact information: Fitness Center, 077920 05477, and 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?

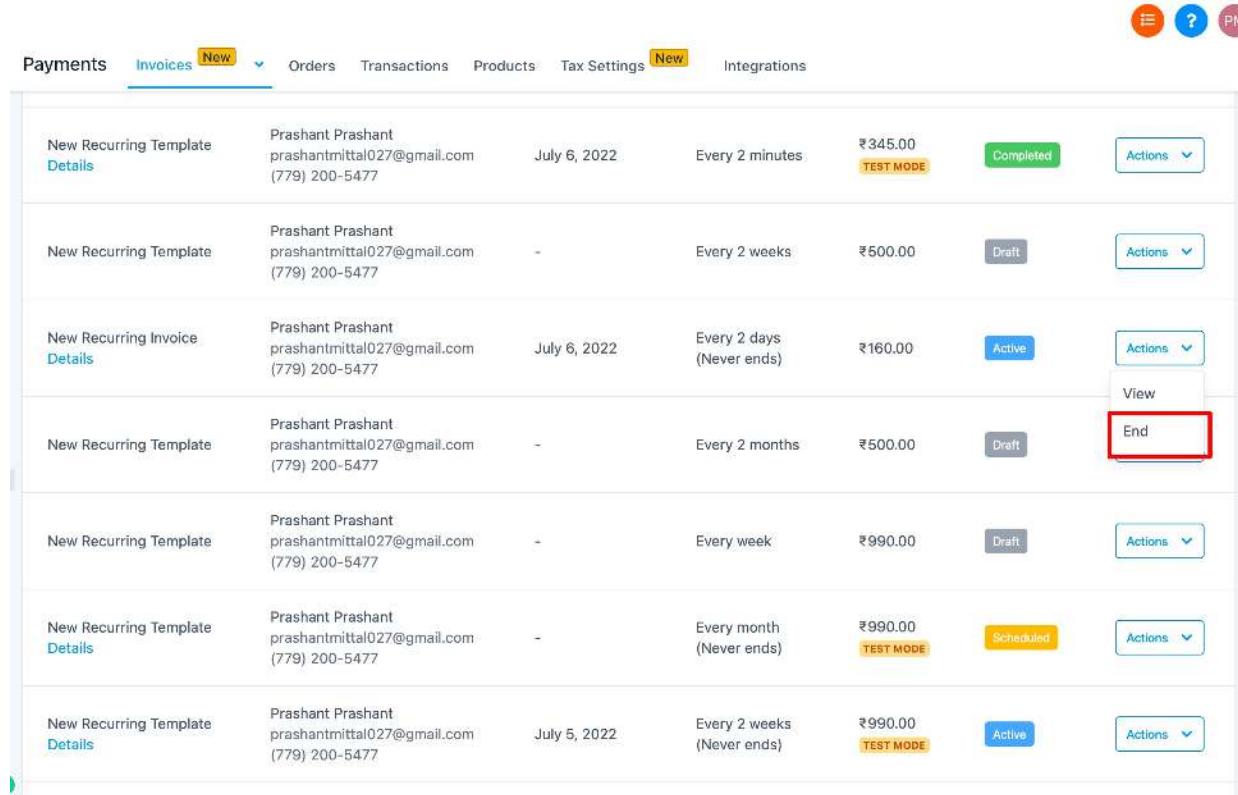
## How to create recurring Invoices

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.

# CaseWho should receive the email?Invoice payment successful ReceiverInvoice payment failed ReceiverInvoice received ReceiverInvoice payment successful SenderInvoice payment failed Sender

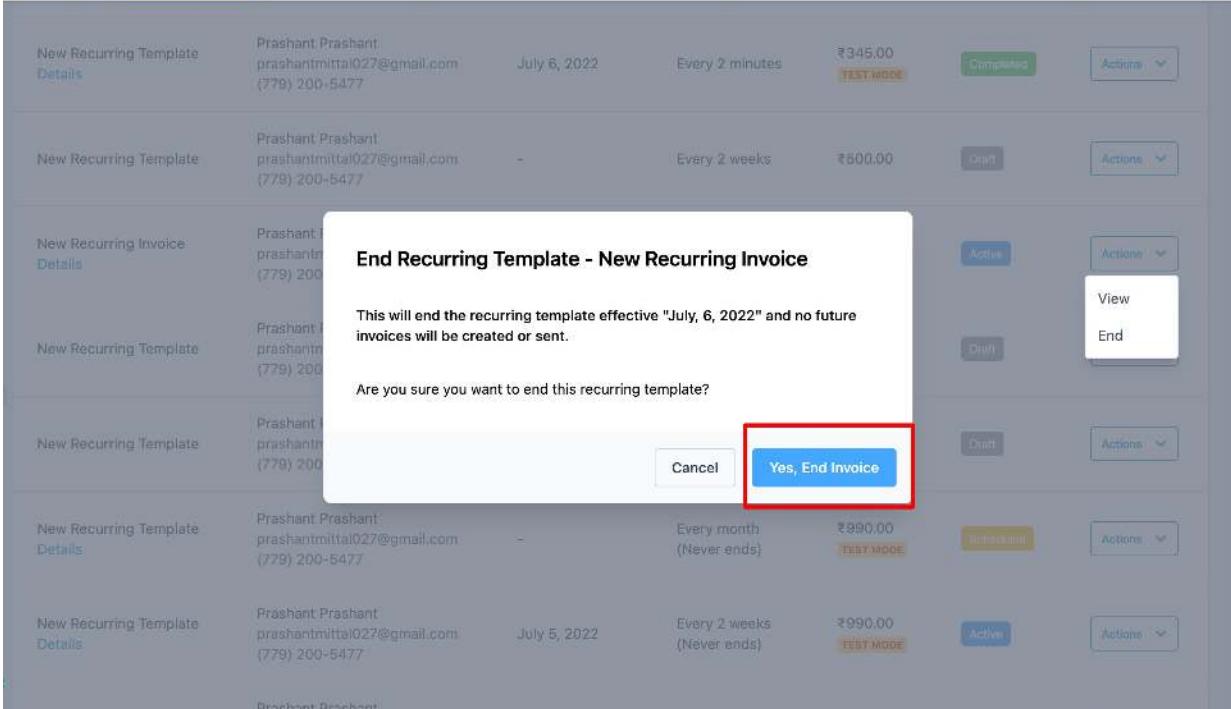
## How to stop sending future invoices?

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:



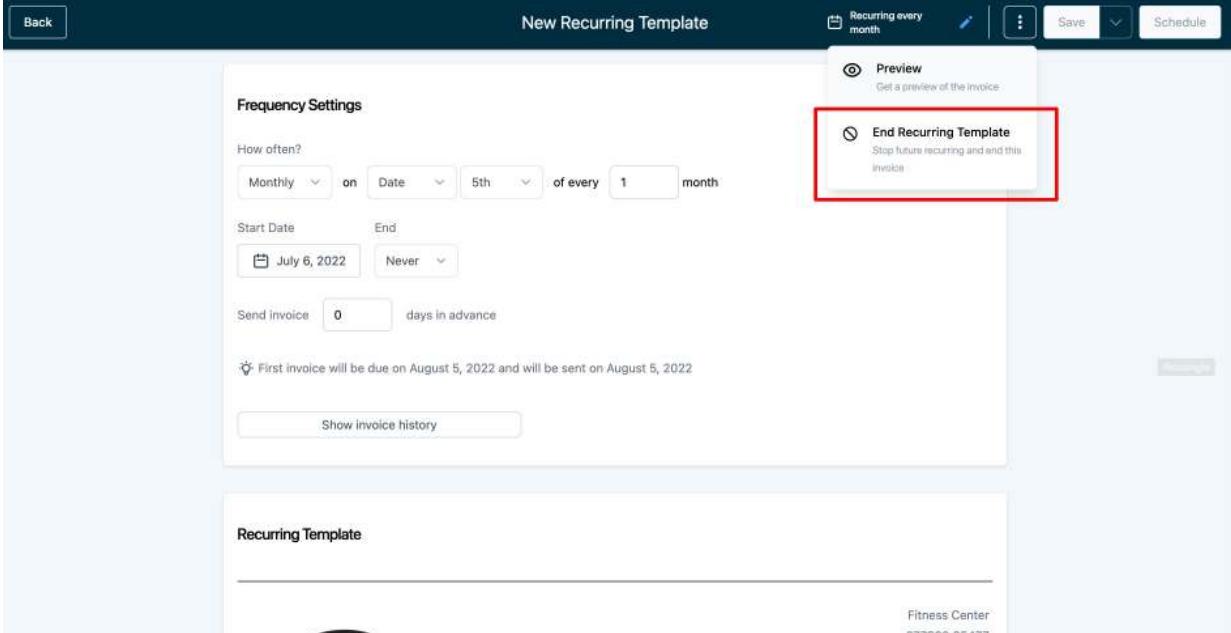
Recurring Templates						
Actions	Template Name	Sender Details	Created Date	Frequency	Amount	Status
Actions	New Recurring Template	Prashant Prashant prashantmittal027@gmail.com (779) 200-5477	July 6, 2022	Every 2 minutes	₹345.00 TEST MODE	Completed
Actions	New Recurring Template	Prashant Prashant prashantmittal027@gmail.com (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
Actions	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

## How to create recurring Invoices



The screenshot shows a list of recurring invoices and templates. A modal window titled "End Recurring Template - New Recurring Invoice" is displayed in the center. The modal contains the message: "This will end the recurring template effective 'July, 6, 2022' and no future invoices will be created or sent." Below this, a question "Are you sure you want to end this recurring template?" is asked, with "Cancel" and "Yes, End invoice" buttons. The "Yes, End invoice" button is highlighted with a red box. The background list shows various recurring templates with details like start date, frequency, and amount.

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



The screenshot shows the "New Recurring Template" builder interface. In the top right, there are buttons for "Recurring every month", "Preview", "Save", and "Schedule". A "Frequency Settings" section is visible, showing "Monthly" selected, "on Date", "5th", "of every 1 month". Below this, "Start Date" is set to "July 6, 2022" and "End" is set to "Never". A "Send invoice" field shows "0 days in advance". A note states: "First invoice will be due on August 5, 2022 and will be sent on August 5, 2022". A "Show invoice history" button is also present. In the top right of this section, a "End Recurring Template" button is highlighted with a red box. The bottom section is titled "Recurring Template".

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

## How to create recurring Invoices

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.