

Recurring Billing

This page covers the process for setting up recurring billing in GoHighLevel (GHL) — ensuring all recurring invoices are created accurately, billed on the correct dates, and managed consistently according to client agreements.

1. Scope

- Setting up recurring invoices
- Managing billing cycles
- Verifying recurring payments
- Preventing billing errors

2. Accessing Recurring Billing

☐ Navigation: GHL → Payments → Invoices & Estimates → + New Recurring Invoice

3. Pre-Setup Validation

REQUIRED BEFORE CREATING RECURRING INVOICE:

1. Open **Masterlist Tracker**
2. Search client name and email
3. Confirm in **GHL**: payment made, amount matches plan, billing status updated

4. Setting Up a Recurring Invoice

1. **Step 1: Add Customer**
 - Click **Select Customer**
 - Search by **email**
 - Select correct client profile

2. Step 2: Add Subject Line

Copy client's name and add the **Plan** name.

Format: [Client Name] + [Plan Name]

Example: *John Doe Essential Membership*

3. Step 3: Product Details

1. Click **Add Product**
2. Confirm **plan** and **pricing** (monthly amount only)
3. Add tax manually — click **Service Fee**
4. Click **Save**

4. Step 4: Recurring Invoice Settings

How Often: Set to monthly, every 1 month. Input the client's requested billing date.

5. Step 5: Start Date (CRITICAL)

Scenario	When to Use	Example	Result
Billing starts THIS month	Select date BEFORE billing date	Billing March 25 → Start date March 24	Bills on March 25 as intended
Billing starts NEXT month	Select date AFTER billing date	Billing March 25 → Start date March 26	Bills on April 25

Date Verification: Double-check the date matches what's displayed at the end of the invoice. Adjust if there is a mismatch.

6. Step 6: End Date

Setting	When to Use
Never	Standard ongoing monthly payments (default)
After	Client specified an end month, or when editing for referral discount

5. Common Mistakes to Avoid

“ Watch out for these billing errors:

- Selecting the **exact billing date** as the start date instead of one day before or after
- Forgetting to check **today's date** before setting the start date

- *Incorrect start date → Wrong billing cycle for client*
- *Using upfront/setup amount instead of the **monthly amount***

Revision #5

Created 2026-04-01 18:31:42 UTC by Admin

Updated 2026-04-28 21:06:13 UTC by Admin