Recurring payments

This article applies to:

Get paid on time, every time. Say goodbye to the hassle of remembering to bill your clients. You can now set up recurring payments, determine payment frequency, add custom start and end dates, and pause payments when necessary. Recurring payments can be access in the Money page or the Money tab in the contact record.

From the Contact Record

1. Click Money

2. Click Add Payment

3. Select a product (you can also add a product on-the-fly by clicking Add a product)
4. Select a payment method (note: recurring payments only works with credit card transactions)

5. To make the payment recurring, simply check the **Recurring payments** checkbox. This will expand the screen to show the recurring payment options. You can select Daily, Weekly, Monthly, and Yearly intervals.

6. You can also decide the number of occurrences, or to end payments by a certain date. You can also modify the start payment date. If you chose a date in the future, the credit card will be charged for the first time at that future date. These options will modify the message at the bottom of the page.
From the Money page

1. Click the **Money** icon on the side panel.

2. Click **Recurring Payments** at the top of the page.

3. Click **Add New** at the top right of the page and select **Recurring Payment** from the drop-down.
4. Select a product (you can also add a product on-the-fly by clicking Add a product)

5. Select a payment method (note: recurring payments only works with credit card transactions)

6. To make the payment recurring, simply check the Recurring payments checkbox. This will expand the screen to show the recurring payment options. You can select Daily, Weekly, Monthly, and Yearly intervals.
7. You can also decide the number of occurrences, or to end payments by a certain date. You can also modify the start payment date. If you chose a date in the future, the credit card will be charged for the first time at that future date. These options will modify the message at the bottom of the page.

Pro-Tips

- To modify a recurring payment, simply click on the recurring payment in the contact record or under in the money page. In here you can modify card details, set the payment as inactive/active and change number of occurrences as well as end date.
- Changing a recurring payment to "inactive" will prevent future payments from taking place, this can be used to pause or stop a recurring payment.
- If a recurring payment is set to inactive, there will be a red "inactive" indicator on the recurring payment.
- If you're reactivating a recurring payment, please note that the next payment cannot begin today, but can initiate as early as tomorrow.