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How to Create Recurring Invoices in QuickBooks Step by Step



Managing invoices manually can take valuable time, especially when your business regularly bills customers for subscriptions, monthly services, maintenance agreements, consulting, or other recurring expenses. Creating the same invoice every week or month increases administrative work and may lead to missed payments, duplicate entries, or billing mistakes.

Recurring Invoices in QuickBooks help businesses simplify this process by setting up invoice templates that can be reused automatically or according to a chosen schedule. Instead of creating each invoice from scratch, you can configure customer details, products, services, payment terms, and billing frequency in advance.

QuickBooks offers recurring transaction features that can help eligible users streamline billing and maintain more consistent financial records. The exact options available depend on whether you use QuickBooks Online or QuickBooks Desktop.

In this guide, you will learn how recurring invoices work, how to create and manage them, how to troubleshoot common problems, and how to maintain accurate customer billing records.

What Are Recurring Invoices in QuickBooks?

Recurring invoices are invoices generated from a saved template on a predetermined schedule. Businesses can use them when customers receive the same services or products regularly and need to be billed repeatedly.

For example, a bookkeeping company may charge a customer $300 every month for ongoing accounting services. Rather than preparing a new invoice each month, the business can configure a recurring transaction template with the appropriate customer information, service description, amount, and schedule.

Depending on the QuickBooks product and template settings, recurring transactions may be scheduled to run automatically, saved as reminders, or created manually from a template.

Common uses include:

- Monthly bookkeeping and accounting services
- Software subscriptions and membership fees
- Consulting and professional service agreements
- Regular maintenance and support contracts
- Rental payments and property management services
- Monthly retainers and service packages

Using recurring invoice templates can reduce repetitive data entry, improve billing consistency, and help businesses establish a more organized invoicing process.

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Benefits of Using Recurring Invoices in QuickBooks

Recurring invoice functionality can make routine billing easier for small businesses and larger organizations.

1. Save Time on Repetitive Tasks

Creating invoices individually can become time-consuming when a business has many regular customers. Recurring templates reduce the need to re-enter the same information repeatedly.

2. Improve Billing Consistency

Saved templates help maintain consistent service descriptions, prices, customer details, and payment terms. This reduces the possibility of accidental differences between invoices.

3. Reduce Missed Billing Dates

Scheduled templates can help businesses remember regular billing dates and maintain a predictable invoicing routine.

4. Improve Cash Flow Management

Sending invoices on time makes it easier to monitor outstanding balances, follow up on overdue payments, and understand expected incoming revenue.

5. Keep Financial Records Organized

Recurring transactions are recorded within the QuickBooks accounting workflow, helping businesses review customer activity and maintain more consistent financial records.

6. Support Business Growth

As the number of customers increases, recurring billing can reduce the additional administrative workload associated with regular invoices.

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How to Create Recurring Invoices in QuickBooks Online

Follow these general steps to configure a recurring invoice template in QuickBooks Online. Menu names and available options may vary by subscription and product updates.

Step 1: Sign In to QuickBooks Online

Open QuickBooks Online and sign in with an authorized account. Select the correct company before creating or changing any transaction templates.

Step 2: Open the Recurring Transactions Section

Look for the recurring transactions feature in the settings or transaction management area.
Depending on your interface, you may find it under the gear-shaped Settings menu.
Open the recurring transactions list to review existing templates and create a new one.

Step 3: Create a New Template

Choose the option to create a new recurring transaction. Select an invoice as the transaction type if the interface asks you to choose a type.
Enter a recognizable template name, such as “Monthly Bookkeeping Invoice” or “Annual Maintenance Billing.”

Step 4: Select the Recurrence Type

Choose the appropriate schedule based on your customer agreement. Available options may include scheduled, reminder-based, or unscheduled templates.
For scheduled invoices, select the frequency and relevant dates. Depending on the available settings, you may be able to configure a start date, an end date, and the number of transactions.
Review the schedule carefully before saving.

Step 5: Enter Customer Details

Select the customer who should receive the invoice. Confirm the customer's billing address, email address, payment terms, and other relevant information.
If the customer is not already listed, add the customer record before continuing.

Step 6: Add Products or Services

Enter the products or services covered by the agreement. Include accurate descriptions, quantities, rates, applicable discounts, and tax information where required.
For example, a monthly consulting invoice might include a description of the consulting package, the agreed monthly fee, and any applicable taxes.
Check that the amounts match the signed agreement or approved pricing.

Step 7: Review Invoice Settings

Confirm the invoice date, payment terms, due date behavior, and any other available settings.
If the template includes an option to email invoices automatically, verify the recipient address and email preferences before enabling it. Do not assume that saving a recurring template automatically means every invoice will be emailed.

Step 8: Save the Recurring Template

Review all details, then save the template. Return to the recurring transactions list to confirm that the template appears and that its schedule is correct.

If the template is scheduled, verify the next transaction date. If it is reminder-based, make sure the reminder process fits your billing routine.

Step 9: Monitor Generated Invoices

Review invoices after they are generated. Confirm that the customer, amount, date, taxes, and payment terms are correct.

Monitoring the first few billing cycles can help you identify incorrect settings before they affect multiple customers.

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How to Set Up Recurring Invoices in QuickBooks Desktop

QuickBooks Desktop users may also have access to memorized transaction features, including recurring invoice templates, depending on the edition and version.

Use the following general process:

1. Open your QuickBooks Desktop company file.
2. Navigate to the invoice creation window.
3. Enter the customer and the products or services to be billed.
4. Verify the invoice amount, terms, and other transaction details.
5. Locate the option to memorize or save the transaction as a template.
6. Give the template a descriptive name.
7. Choose a reminder or scheduling option if available.
8. Configure the frequency and next transaction date.
9. Save the memorized transaction.
10. Review the memorized transactions list and verify the schedule.

QuickBooks Desktop interfaces differ across editions and releases. Some versions use memorized transactions rather than the same recurring transaction interface available in QuickBooks Online. Always verify the available functionality in your specific version before relying on automatic transaction creation.

Scheduled, Reminder-Based, and Unscheduled Templates

Understanding recurring template types helps you choose the right billing method.

Scheduled Templates

Scheduled templates are designed for transactions that occur at regular intervals. Depending on the product and configuration, QuickBooks can create the transaction according to the schedule.

These templates are useful for stable monthly or quarterly billing arrangements.

Reminder-Based Templates

Reminder-based templates notify you when a recurring transaction is due. You can review the details before creating the invoice.

This approach is useful when invoice amounts, service quantities, or billing dates may change.

Unscheduled Templates

Unscheduled templates save transaction details without automatically generating the invoice on a fixed timetable. You can use the template whenever needed.

This option works well for repeat customers whose invoices share similar details but do not follow a predictable schedule.

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How to Edit or Delete a Recurring Invoice Template

Business agreements can change, so it is important to keep recurring invoice templates updated.

To edit a template, open the recurring transactions list, select the appropriate template, and choose the edit option. Update the customer details, price, service description, frequency, or other necessary fields. Save the changes and verify the next scheduled transaction.

To remove a template, open the recurring transactions list and select the delete or make inactive option, depending on the product.

Before deleting a template, consider whether you need it for future billing. Removing a template is not necessarily the same as deleting invoices that have already been created.

If you need to change a customer's recurring fee, confirm the effective date and review any invoices already generated. This helps prevent incorrect charges or unintended changes to historical accounting records.

Common Problems With Recurring Invoices in QuickBooks

Although recurring templates can simplify billing, configuration problems may prevent them from working as expected.

1. Recurring Invoices Are Not Generated

A recurring invoice may not appear when expected because the template is inactive, the next transaction date is incorrect, or the recurrence settings are incomplete.

What to do:

- Open the recurring transactions list.
- Verify that the correct template exists.
- Review the recurrence type and next transaction date.
- Check the start and end dates.
- Confirm whether the template is scheduled or reminder-based.
- Review any displayed alerts or error messages.

Do not create a duplicate invoice until you confirm that the original transaction has not already been generated.

2. Incorrect Invoice Amounts

Incorrect rates, quantities, discounts, or tax settings can cause recurring invoices to contain unexpected totals.

Open the template and compare its details with the current customer agreement. Review the tax settings and confirm that products or services have the correct rates.

If an invoice has already been sent, follow your normal correction process rather than assuming an edit to the template will update the existing invoice.

3. Customers Are Not Receiving Invoices

A recurring invoice may be created successfully without being emailed to the customer.

Check the customer's email address, the template's email settings, and the transaction's delivery status. Review any email errors or notifications in QuickBooks.

If necessary, send the invoice manually after confirming that it has not already been delivered.

4. Duplicate Recurring Invoices

Duplicate billing may occur when multiple templates exist for the same customer, a user creates an invoice manually in addition to a scheduled transaction, or a transaction is repeated unintentionally.

Review the recurring transaction list and the customer's invoice history. Compare invoice dates, amounts, and invoice numbers before taking action.

Establish a consistent process for managing manual and scheduled invoices to prevent duplicate charges.

5. Recurring Invoice Dates Are Incorrect

Incorrect start dates, recurrence intervals, or end dates can lead to invoices being generated at unexpected times.

Open the template and check the schedule against the customer agreement. Pay special attention to monthly billing dates, quarterly schedules, and templates that end after a specific number of transactions.

6. Changes to a Template Do Not Update Existing Invoices

A recurring template generally controls future transactions. Editing it should not be assumed to change invoices that have already been created or sent.

Review the specific invoice separately if a correction is required. Follow your accounting procedures to preserve an accurate transaction history.

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Best Practices for Managing Recurring Invoices

To get the most from recurring billing, follow these practical recommendations:

- **Use descriptive template names:** Make each template easy to identify.
- **Verify customer information:** Check billing contacts and email addresses regularly.
- **Review pricing periodically:** Update fees when contracts or service rates change.
- **Check tax details:** Confirm applicable tax settings for each customer and service.
- **Monitor invoice delivery:** Verify that customers receive invoices as expected.
- **Reconcile customer payments:** Match received payments against outstanding invoices.
- **Avoid duplicate billing:** Review existing templates before creating new ones.
- **Maintain backups and access controls:** Protect accounting records and restrict sensitive actions to authorized users.
- **Review recurring transactions monthly:** Confirm that schedules, amounts, and active customers remain accurate.

- **Document billing changes:** Keep a record of approved price changes, cancellations, and contract renewals.

These habits help businesses maintain reliable invoicing processes as their customer base grows.

When to Contact QuickBooks Support

Sometimes recurring invoice issues require additional troubleshooting, especially when invoices fail to generate, email delivery problems persist, or a template behaves differently than expected. Before seeking assistance, record the QuickBooks product and version you use, the template name, the scheduled date, the affected customer, and any error message displayed. Avoid sharing passwords, payment information, or other sensitive account details.

For help reviewing recurring invoice settings and related accounting workflows, you can seek **QuickBooks Support** through official QuickBooks support channels or a qualified accounting software professional.

You can also contact your bookkeeping service provider at **+1(833) 279 9443** for assistance with understanding recurring invoice workflows, reviewing template settings, and organizing routine billing tasks. Verify the provider's identity and service terms before sharing access to financial records.

Frequently Asked Questions About Recurring Invoices in QuickBooks

1. Can QuickBooks Automatically Create Recurring Invoices?

Yes, supported QuickBooks products offer recurring transaction features. Automatic creation depends on the template type, subscription, version, and configuration.

2. Can I Set Up Monthly Recurring Invoices?

Yes. Where supported, you can configure a monthly schedule and specify the relevant dates. Review the schedule to make sure it matches your billing agreement.

3. Can I Change the Amount of a Recurring Invoice?

Yes. You can generally edit the template for future invoices. Check existing invoices separately because template changes may not update transactions already created.

4. Why Is My Recurring Invoice Not Sending Automatically?

The invoice may be generated without being emailed. Check the template's email settings, customer email address, transaction status, and any delivery notifications.

5. Can I Stop a Recurring Invoice?

You can usually edit, deactivate, or delete a recurring template, depending on the product. Check for invoices already created or scheduled before removing the template.

6. Are Recurring Invoices Available in QuickBooks Online and Desktop?

Recurring transaction functionality is available in supported QuickBooks products, but the menus and setup process differ. QuickBooks Online uses recurring transaction templates, while QuickBooks Desktop may use memorized transactions.

7. Do Recurring Invoices Guarantee On-Time Payments?

No. Recurring invoices can make billing more consistent, but payment still depends on the customer, payment terms, and available payment methods. Monitor overdue invoices and follow up when necessary.

8. Should I Review Recurring Invoices Regularly?

Yes. Periodically review active templates, customer details, invoice amounts, tax settings, and scheduled dates to catch errors before they affect your accounting records.

Conclusion

Recurring Invoices in QuickBooks can help businesses reduce repetitive billing work, improve invoice consistency, and manage regular customer charges more efficiently. By choosing the appropriate template type, verifying customer information, setting the correct schedule, and monitoring generated invoices, you can build a more dependable invoicing process.

Whether you use QuickBooks Online or QuickBooks Desktop, review the recurring transaction features available in your specific product and keep your templates aligned with current customer agreements.

Regular monitoring, accurate records, and careful invoice delivery checks can help prevent common problems and support better financial management. When additional assistance is needed, consult official product documentation or a qualified professional who can help you review your recurring billing workflow.