

# Auto-billing - Recurring Service

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**Step 1: Create a preorder which includes the products, services, and or packages you wish to sell on a recurring basis.**

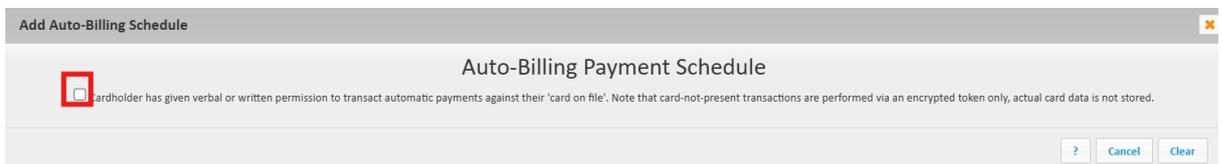
1. Navigate to the sales register in Wylie.
2. Add all the items you wish to include in the recurring charge to the cart.
3. Select '**Capture Preorder**' and give it a name that you will recognize.
4. Select '**Save**'.

**Step 2: Ensure the client you wish to sell to has a credit card on file in Wylie.**

1. Navigate to the client's profile and select the '**Card on File**' tab.
2. Select '**Add Card on File**' and enter the required credit card information for this client. OR select '**Send COF Link**' to request that the client add their credit card through a secure link.

**Step 3: Create a 'recurring service' auto-billing schedule.**

1. Select the '**Auto-billing**' tab in the client's profile.
2. Select '**Add New**' button at the top of the table. You will then see the autobilling set-up form that you will need to fill out with the specific parameters.
3. Start by checking the box that declares you have permission to change the card on file.



**Add Auto-Billing Schedule**

**Auto-Billing Payment Schedule**

Cardholder has given verbal or written permission to transact automatic payments against their 'card on file'. Note that card-not-present transactions are performed via an encrypted token only, actual card data is not stored.

? Cancel Clear

4. Choose the '**Schedule Type**', '**Recurring Service**', then select the preferred '**Payment Method**'.
5. Choose the '**Preorder Name**' of a saved preorder that you would like to charge the client for on a recurring basis. You must first create the preorder in the sales register. This preorder can include a combination of services, products, and packages.

**Add Auto-Billing Schedule**

**Auto-Billing Payment Schedule**

Cardholder has given verbal or written permission to transact automatic payments against their 'card on file'. Note that card-not-present transactions are performed via an encrypted token only, actual card data is not stored.

Patient:  Schedule Type:  Schedule Name:

Payment Method:  Card Nickname:

Preorder Name:  Preorder Total: \$300.00 Products on Preorder: ^

Payment Frequency:  Start Date:

? Cancel Clear

6. Choose 'Payment Frequency', then 'Start Date'.

Payment Frequency:  Start Date:  Tue Oct 07 2025

7. You have 3 options for choosing when the recurring payments will stop.

- **'Schedule is cancelled'**: When an employee manually cancelled the auto-biling schedule.
- **'Payment Count'**: Enter the number of recurring payments that will be auto-billing before the schedule is stopped automatically.
- **'End Date'**: Choose the date that the autobilling schedule will be canceled on.

Payments repeat until: 
 Schedule is cancelled:
  Payment Count: 
 End Date:

8. Select whether you would like to email a transaction receipt and if you would like to notify the client in advance of the automatic charge.

Email Transaction Receipts:  Email Advance Notice of Charges:

9. Lastly, select 'Save'.

Online URL: <https://help.wyliebiz.com/article.php?id=82>

