# Auto-billing - Recurring Service

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

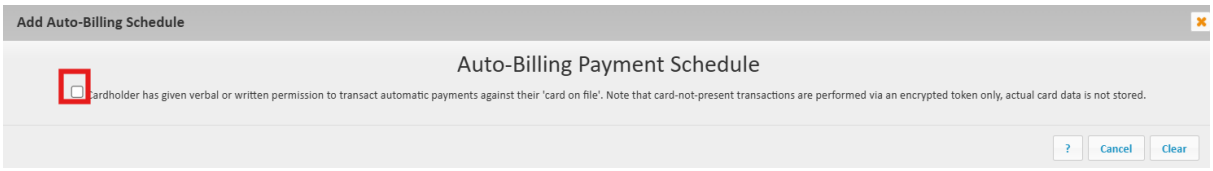
1. Navigate to the sales register in Wylie.
2. Add all the items you wish to include in the recurring charge to the cart.
3. Select **'Capture Preorder'** and give it a name that you will recognize.
4. Select **'Save'**.

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

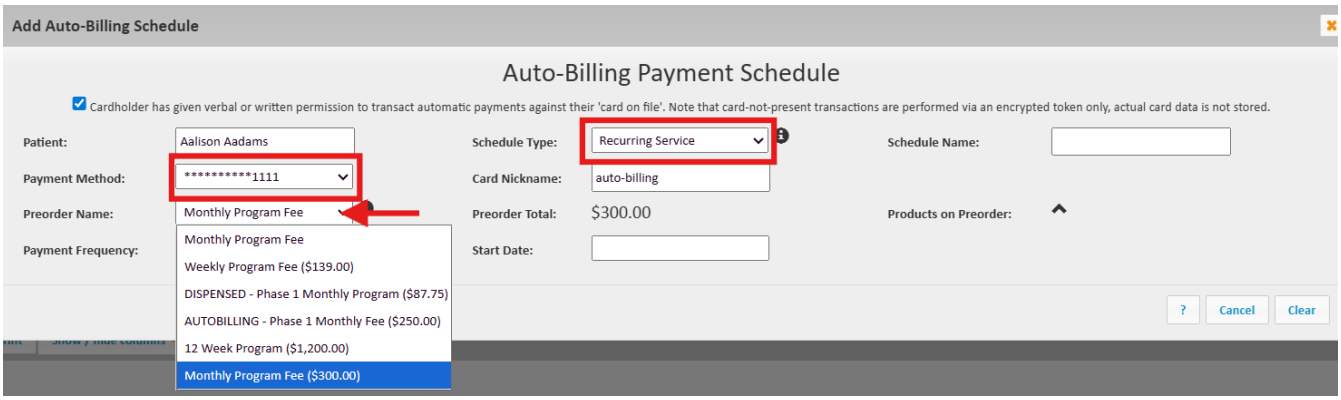
1. Navigate to the client's profile and select the **'Card on File'** tab.
2. Select **'Add Card on File'** and enter the required credit card information for this client. OR select **'Send COF Link'** to request that the client add their credit card through a secure link.

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

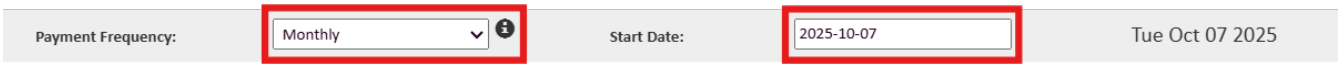
1. Select the **'Auto-billing'** tab in the client's profile.
2. Select **'Add New'** button at the top of the table. You will then see the autobilling set-up form that you will need to fill out with the specific parameters.
3. Start by checking the box that declares you have permission to change the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




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.




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




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.

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.

9. Lastly, select **'Save'**.

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