Billing Structure Overview

Setup Fees

This page covers Setup Fees at Crowned Credit — the one-time charge required before client onboarding begins, including fee structure, process flow, refund policy, and exceptions.

1. Objective

To ensure accurate, consistent, and timely collection of setup fees upon client enrollment, while maintaining clear coordination between **Sales** and **Billing** teams and preventing onboarding of unpaid accounts.

2. Scope

This SOP applies to all clients enrolling in any service package and covers the process of invoicing, collecting, verifying, and recording setup fee payments using **GoHighLevel**, including payments made via **invoice**, **website purchase**, **Zelle**, and **Cash App**.

3. Definition: Setup Fee

A one-time, non-recurring charge applied upon client enrollment. The setup fee is required before onboarding begins and covers **initial account preparation** and the **first round of disputes**.

4. Setup Fee Structure (Per Package)

Service	Upfront	Monthly
Essential Membership (Solo)	$150 +tax	$99 +tax
Essential Membership (Couple)	$250 +tax	$175 +tax (Individual: $87.50 +tax)
Essential Membership (Family of 3)	$350 +tax	$262 +tax
Accelerated Membership (Solo)	$249 +tax	$199 +tax

Service	Upfront	Monthly
Accelerated Membership (Couple)	$400 +tax	$350 +tax
Momentum Membership (One-Time)	$1,095	—

5. Process Flow

1. **Client Agreement:** Client expresses intent to proceed with a selected package.
2. **Invoice Creation / Payment Direction: Sales** creates an invoice in **GoHighLevel** OR directs the client to the website: https://getcrownedcredit.com/pricing
3. **Payment Collection:**
   - **A. Invoice Payment:** Client pays invoice — system automatically tags client as **Won**.
   - **B. Website / Zelle / Cash App Payment: Billing team** verifies payment notification in **Discord**. Follow internal SOP: *Marking Client Payments as Paid*.
4. **Onboarding Eligibility:** Confirm setup fee is paid before proceeding to onboarding.

> ***Note:*** *Onboarding ONLY begins after setup fee is paid. Unpaid clients remain in follow-up stage under Sales.*

6. Refund Policy

> ***Note:*** *Setup fee is refundable within* ***3 days*** *of payment. The client must notify within the 3-day window as stipulated in the agreement.*

7. Exceptions & Special Cases

- **A. Partial Payment:** We allow clients to proceed with onboarding once the first half is paid.
- **B. Duplicate Payments:** Notify **Billing** immediately. Do not process refund without approval.
- **C. Payment Not Found:** Request proof of payment from client. Check **Truist Alerts** in **GoHighLevel Conversations**.

Referral

This page covers the Referral Bonus Program at Crowned Credit — how to collect referrals, track bonuses, process payouts, and communicate with referring clients.

1. Objective

To encourage client referrals by providing incentives while ensuring proper tracking, verification, and processing of all referred leads.

2. Referral Bonus Structure

Plan Type	Bonus Amount	Payout Methods
Essential / **Accelerated** clients	$50 per successful sign-up	Zelle, Cash App, or bill credit (active clients only)
Momentum Plan clients	$75 per successful referral	Zelle or Cash App
Inactive clients	$50 per successful sign-up	Zelle or Cash App

> ***Note:*** *Bonuses are available to claim one month after the referral signs up.*

3. Qualification Criteria

- **Completed Payment:** Referred person signs up and completes payment.
- **New Lead:** Referral is new — not an existing or past lead.
- **Verified Referrer:** Referring client is properly identified in the system.

4. Collecting Referral Info

Collect the following from the referring client: **Full Name**, **Phone Number**, and (Optional) **Email**.

Referral Collection Script

"Hi {{contact.first_name}}. Thank you for referring someone to us! May I please get their full name and best contact number so we can reach out and assist them?"

5. Tagging & Documentation (Discord)

Post **referrer name**, **referral name + phone** to the **"General" GC** in **Discord**. Tag the appropriate **closer** or **Sales Team**.

6. Bonus Processing

1. **Verify Eligibility:** Confirm referral meets all qualification criteria.
2. **Confirm Payout Method:** Ask referring client for preferred method (Zelle, Cash App, or bill credit).
3. **Process Payment:** Send via **Zelle** / **Cash App**, or apply as bill credit. Note: bonus applied to bill is reflected in the following month. Zelle/Cash App allow **3–5 business days**.
4. **Notify Billing:** Notify **Billing Department (Khryzza)** and leave a note in **GHL** / **Closed List Tracker**.

7. Communication to Referrer

Essential/Accelerated — Bonus Approved

"Thank you for your referral {{contact.first_name}}! Your $50 bonus has been approved. Please let us know if you'd like to receive it via Zelle, Cash App, or as a credit toward your next bill."

Momentum/Inactive — Bonus Approved

"Thank you for your referral {{contact.first_name}}! Your $50 bonus has been approved. Please let us know if you'd like to receive it via Zelle or Cash App?"

8. Compliance

Ensure **legitimate referrals** only. Maintain full documentation of all referrals and payouts. All bonuses are subject to policy.

9. SMS Scripts (Billing Dept)

Active Client (Essential/Accelerated) — Option A

"Hi {{contact.first_name}}, Thank you for sending your referral! We truly appreciate your support. We're happy to confirm that we have successfully received the individual you referred. As a thank you, you will be receiving a $50 referral bonus. Please let us know how you would like to receive it via Zelle or Cash App and send your preferred payment details through this message. Alternatively, we can apply the $50 as a credit toward your next month's bill. Once we receive your details, we'll process the referral bonus promptly. Thank you again for trusting and supporting Crowned Credit. Keep those referrals coming! Best regards, Crowned Credit Team"

Active Client — Option B (Applied to Bill)

"Hi {{contact.first_name}}, good day! Thank you so much for sending in referrals! We're happy to confirm that we've received the following referral(s): [Referral Name(s)]. As a result, $50 will be deducted from your [Month] bill! We truly appreciate your support, keep those referrals coming! Thank you again, Crowned Credit Team"

Momentum/Inactive Client

"Hi {{contact.first_name}}, Thank you for sending your referral! ...receiving a $50 referral bonus. Please let us know how you would like to receive it via Zelle or Cash App... Best regards, Crowned Credit Team"

Monthly Billing

This page covers Monthly Billing Cycles at Crowned Credit — billing schedules, payment processing, follow-ups, and handling of failed payments using GHL, Discord, and internal trackers.

1. Objective

Ensure consistent, timely, and accurate processing of monthly client payments.

2. Scope

All clients on **recurring service plans**. Covers billing schedules, payment processing, follow-ups, handling of failed payments and exceptions using **GHL**, **Discord**, and **internal trackers**.

Quick Reference Summary

Section	Key Detail
Invoice Creation	Sent 3 days before billing date
Recurring Billing	Monthly on selected date, autopay by default, auto-drafts at 3:00 PM EST
Split Payments	Allowed only within the same calendar month
Failed Payments	Notified via Discord (Failed Payments Channel), logged in tracker
Payment Extensions	Case-by-case, documented in GHL

3. Invoice Creation

Invoices sent **3 days before** the billing date. The **first monthly billing date** may be adjusted. Subsequent billing follows the fixed recurring date.

> **See also:** Invoice Creation SOP for full step-by-step instructions.

4. Recurring Billing

Clients billed **monthly** on their selected date. **Autopay** is the default method.

> *“ **Note:** Auto-drafts process at **3:00 PM EST** on the billing date.*

> *“ **Warning:** Split payments are only allowed within the **same calendar month**. No cross-month splits.*

> **See also:** Recurring Billing SOP for full step-by-step instructions.

5. Failed Payment Handling

Billing team notified via **Discord (Failed Payments Channel)**. Client logged in tracker.

> **See also:** Failed Payment Handling SOP for full step-by-step instructions.

6. Payment Extension

Handled on a **case-by-case** basis. All extensions must be documented in **GHL**.

> **See also:** Payment Extension SOP for full step-by-step instructions.

Payment Methods

This page covers Payment Methods at Crowned Credit — accepted and restricted payment options, autopay setup, payment verification steps, and tracking protocols.

1. Objective

Define accepted payment methods and ensure proper handling, verification, and recording of all client payments.

2. Scope

All client payments including **setup fees** and **monthly billing**.

3. Accepted & Restricted Payment Methods

Method	Status	Notes
Card	Accepted	Auto-draft via **GHL**
Zelle	Accepted	Manual verification required
Cash App	Accepted	Manual verification required
American Express (Amex)	Restricted	Guide client to an alternative method
Discover	Restricted	Guide client to an alternative method

4. Autopay vs Manual

> **Autopay Info:** Autopay is the default for all recurring clients. Default draft time is **3:00 PM EST**. Clients may request manual payment if needed.

5. Payment Verification

1. **Card Payments (GHL):** Auto-recorded in **GoHighLevel**. Team notified automatically via **Discord**.
2. **Zelle / Cash App:** Verify via **Discord notifications**, client-provided proof, or **Truist Alerts** in **GHL**.
3. **Mark Invoice Paid:** Once confirmed, mark invoice as paid in **GHL** and update the internal tracker.

> ***Warning:*** *Never mark a payment as paid without confirmation. Refer to: Marking Client Payments as Paid SOP.*

6. Payment Issues

Request proof of payment from the client and cross-check all records before taking action.

> **See also:** Failed Payment Handling SOP for full step-by-step instructions.

7. Tracking

All payments tracked across: **GHL**, **Discord (Payment Channels)**, and the **Internal Tracker**.

Payments in GHL (Navigating the Payments section)

This page covers navigating the Payments section in GoHighLevel (GHL) — including how to access invoices, review transactions, record payments, and follow best practices for accurate billing management.

1. Overview

The **Payments** section in **GoHighLevel (GHL)** provides visibility on:

- All transactions (successful and failed)
- Invoice status
- Payment method used
- Date and amount

Scope: All team members responsible for reviewing transactions, verifying payments, updating client payment statuses, following up on failed payments, and managing terminations and reactivations.

2. Accessing the Payments Section

> **Navigation:** Log in to **GHL** → Left-side menu → Click **Payments**

Available Tabs:

- **Invoices & Estimates**
- **Transactions**
- **All Documents & Contracts**

3. Navigating the Payments Tabs

3.1 Invoices Tab

Navigate to **Payments → Invoices & Estimates** to view all client invoices.

Field	Description
Invoice Name	Name of the invoice
Number	Invoice reference number
Customer Name	Client associated with invoice
Issue Date	Date invoice was issued
Amount	Total invoice amount
Status	Paid, Overdue, Draft, Sent, Payment Processing, Partially Paid, Void

Search: Use the Search bar → Enter client name or email → Select invoice.

Filter: Click **Filters** → Select status.

> **Tip:** Always check the **Overdue** filter to cross-reference with the internal overdue tracking list.

3.2 Invoice Actions

Click the three dots (⋮) beside any invoice to access available actions:

Action	Description	When to Use
View	Open invoice in read-only mode	Reviewing a paid invoice
Edit in New Tab	Open invoice for editing	Unpaid/processing invoices needing corrections
Copy Link	Copy the invoice payment link	Sending link to client via SMS
Download	Save invoice as PDF	Archiving or sharing documentation
Record Payment	Manually confirm payment or charge a card	Payment received externally
Clone	Duplicate the invoice	Creating a similar invoice
Convert to Template	Save as reusable template	Standardizing recurring formats

Action	Description	When to Use
View Transaction	See associated payment transaction	Verifying paid invoice transaction
Void	Permanently cancel the invoice	Only when fully cancelling — IRREVERSIBLE

> *“ **WARNING: Void = Permanently cancels** the invoice. This action cannot be undone. Use with extreme caution and only when absolutely necessary.*

3.3 Recording Payments

Click **Record Payment** and choose your method:

Method	When to Use
Charge a Card	Directly charge client's credit/debit card on file
Record Manually	Payments already received via **Zelle**, **Cash App**, or Website

> Only use **Record Manually** if payment has already been confirmed outside of **GHL**.

3.4 Transactions Tab

Navigate to **Payments → Transactions** to verify payment activity:

- View successful and failed payments
- Identify payment status, amount, date, and last 4 digits of card
- Check when verifying if payment went through or why it failed

3.5 All Documents & Contracts Tab

Navigate to **Payments → All Documents & Contracts** to confirm signed agreements and review stored contracts.

4. Best Practices

> **Best Practices for Payments in GHL:**

- Always **double-check** before using **Void** or **Record Payment**
- Use **Search** instead of scrolling
- Search by **email** for more unique client lookup
- Regularly review the **Overdue** filter
- Ensure invoice details (client name + plan) are accurate
- Cross-check **Transactions** before marking payment manually