Core Processes

- Invoice Creation
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Invoice Creation

This page covers the step-by-step process for creating invoices in GoHighLevel (GHL) — ensuring all invoices are accurate, consistently formatted, and ready for payment processing.

1. Scope

All team members responsible for:

- Creating new invoices
- Inputting correct client and plan details
- Ensuring invoices are ready for payment processing

2. Accessing Invoice Creation

> 🗺️ **Navigation: GHL → Payments → Invoices & Estimates → + New Invoice** (top right)

3. Creating a New Invoice

1. **Step 1: Add Customer Information**
   - Click **Select Customer**
   - Search using client's **email address**
   - Select the correct client
2. **Step 2: Plans and Pricing**
   - Ensure **Plan** and **Pricing** details are correct
   - Products with pricing are already set up — no changes typically required
3. **Step 3: Review Invoice Preview**
   Check the right-side preview panel for:

Check	Detail
✅ Correct client name	Matches client record in GHL

Check	Detail
☐ Correct plan	Matches selected service tier
☐ Correct total amount	Matches agreed pricing — monthly, not upfront
☐ Due date accuracy	Matches client's billing date
☐ Delivery method	**Email only** — NOT email & text

4. **Step 4: Save or Send**

Action	When to Use
Save	Invoice is not ready to be sent yet
Send	Deliver the invoice to client's email immediately

4. Important Reminders

> ***Always double-check before sending:***
>
> - *Client **email** and **phone number** are correct*
> - ***Plan** and **pricing** are accurate*
> - *Delivery set to **email only** — NOT email & text*
> - *Amount reflects the **monthly** amount, not the upfront/setup fee*

Recurring Billing

This page covers the process for setting up recurring billing in GoHighLevel (GHL) — ensuring all recurring invoices are created accurately, billed on the correct dates, and managed consistently according to client agreements.

1. Scope

- Setting up recurring invoices
- Managing billing cycles
- Verifying recurring payments
- Preventing billing errors

2. Accessing Recurring Billing

Navigation: GHL → Payments → Invoices & Estimates → + New Recurring Invoice

3. Pre-Setup Validation

REQUIRED BEFORE CREATING RECURRING INVOICE:

1. Open **Masterlist Tracker**
2. Search client name and email
3. Confirm in **GHL**: payment made, amount matches plan, billing status updated

4. Setting Up a Recurring Invoice

1. **Step 1: Add Customer**
    - Click **Select Customer**
    - Search by **email**
    - Select correct client profile

2. **Step 2: Add Subject Line**
   Copy client's name and add the **Plan** name.

   > □□ **Format:** [Client Name] + [Plan Name]
   >
   > Example: *John Doe Essential Membership*

3. **Step 3: Product Details**
   1. Click **Add Product**
   2. Confirm **plan** and **pricing** (monthly amount only)
   3. Add tax manually — click **Service Fee**
   4. Click **Save**
4. **Step 4: Recurring Invoice Settings**
   How Often: Set to monthly, every 1 month. Input the client's requested billing date.
5. **Step 5: Start Date (CRITICAL)**

Scenario	When to Use	Example	Result
Billing starts THIS month	Select date **BEFORE** billing date	Billing March 25 → Start date March 24	Bills on March 25 as intended
Billing starts NEXT month	Select date **AFTER** billing date	Billing March 25 → Start date March 26	Bills on April 25

   Date Verification: Double-check the date matches what's displayed at the end of the invoice. Adjust if there is a mismatch.
6. **Step 6: End Date**

Setting	When to Use
Never	Standard ongoing monthly payments (default)
After	Client specified an end month, or when editing for referral discount

5. Common Mistakes to Avoid

> ***Watch out for these billing errors:***
> - □ *Selecting the **exact billing date** as the start date instead of one day before or after*

> - ❌ *Forgetting to check **today's date** before setting the start date*
> - ❌ *Incorrect start date → Wrong billing cycle for client*
> - ❌ *Using upfront/setup amount instead of the **monthly amount***

Advance Payment

This page covers the process for handling advance payments from clients — including how to void active invoices, create a new advance payment invoice, send it to the client, and adjust the recurring billing schedule accordingly.

1. Overview

When a client wants to pay ahead of their scheduled billing date, the team must process an **Advance Payment** by voiding the existing invoice and creating a new one-time invoice for the correct date and amount.

2. Initial Steps

1. **Step 1: Check original payment date/due date** in **GHL**
2. **Step 2: Ask client** when they plan to make the advance payment
3. **Step 3: Add a GHL note** — "*Client requested advance payment.*"
4. **Step 4: Send details** to the **Billing Department** (**Khryzza** or **Regine**)
5. **Step 5: Void the active invoice** to avoid a double charge

> *“ **WARNING: Void the active invoice FIRST** before creating a new advance payment invoice. Failing to do so will result in a double charge to the client.*

3. Creating the Advance Payment Invoice

1. **Step 1:** Select **One-Time Invoice** as the invoice type
2. **Step 2:** Set the **Due Date** to the client's requested payment date
3. **Step 3:** Enter the **exact monthly payment amount**
4. **Step 4:** Set delivery to **email only**
5. **Step 5:** Save and send the invoice

Field	Setting

Invoice Type	**One-Time Invoice**
Due Date	Client's requested payment date
Amount	**Exact monthly payment amount**
Delivery	**Email only**

After Creating the Invoice:

1. Send client the invoice link via **SMS**
2. To copy link: Use payment search bar → click ⋮ (three dots) → **Copy Link** → Send via SMS
3. Notify **Khryzza** or **Regine** in the **Billing Department**

4. Adjusting Recurring Invoices (Billing Department)

Handled by: Khryzza or Regine (Billing Department)

If Active Recurring Invoice Exists:

1. End the current recurring invoice
2. Create a new recurring invoice for the correct amount
3. Set up for following months

If Already Scheduled:

1. Edit due dates and setup dates
2. Click **Save**

5. Notes & Reminders

Reminder	Details
Confirm client's requested date	Always verify with client before creating invoice

Reminder	Details
Void BEFORE creating new invoice	Prevents double billing — no exceptions
Notify Billing Department	**Khryzza** or **Regine** must adjust recurring schedule
Recurring schedule accuracy	Ensure recurring reflects all future payments correctly
Documentation	Keep records for tracking and auditing purposes

Failed Payment Handling

This page covers the complete failed payment handling process at Crowned Credit — from identifying failed payments to follow-up sequences, special case handling, and account termination procedures.

1. Objective

Ensure all failed payments are addressed promptly, minimize revenue loss, maintain client relationships, and maintain accurate records.

2. Scope

All **Billing** team members responsible for monitoring, following up, and resolving failed payments for clients on recurring monthly plans (excluding one-time payments like **Momentum**, **ChexSystem**, or **EWs**).

Tool	Purpose
GHL	Payment tracking and auto-draft scheduling
Discord	Payment notifications (Success channel / Failed channel)
Excel Tracker	Logging failed payments and follow-up status

3. Failed Payment Handling

Step 1: Monitor Payment Status

- All clients are on **autopay by default** unless they request manual payment
- Payment methods: **Card** (auto-draft via **GHL**), **Zelle**, **Cash App**
- **Amex** and **Discover** cards are not accepted
- Auto-draft is scheduled daily at **3:00 PM EST**
- Failed payment attempts are automatically retried once every **3 days** at **3:00 PM EST** before stopping
- Manual drafts are only done on the date the client specified, if a card is on file

Step 2: Identify Failed Payments

- **GHL** triggers a **Discord** alert in the "Failed Payment" channel
- Log in **Excel Tracker**: Client name, **DisputeFox** Status, Due date

Step 3: Client Follow-Up

- Follow-up begins after the first failed payment
- Contact via **call, SMS, or Email** using pre-written scripts + invoice link
- Auto-draft retries continue every **3 days** after original due date

> ***Note:*** *A* ***7-day grace period*** *is applied from the original due date.*

Day	Action	Channel
Day 1-3	Retry auto-draft (system) + Manual follow-ups	**GHL** Auto + Call, SMS, Email
Day 4	Skip	—
Day 5-7	Manual follow-ups only	Call, SMS, Email
After Day 7	If no response/payment declined - Termination	**GHL** + **Discord**

> ***Warning:*** *If there is no response or if payment is declined after the promised date, and is beyond the* ***7-day grace period****, the account will proceed to* ***Termination****.*

Step 4: Handle Special Cases

- Some exceptions may apply (e.g., **hospitalization**, **lost job**, **payroll issues**)
- Note these in **GHL** notes or in **Excel** and proceed based on approval
- **Changing billing dates is not allowed**, but deadline extensions may occur within the **7-day grace period**

Step 5: Payment Resolution

If payment succeeds: Send a "Thank you for your payment" message, update **Excel Tracker** and **DisputeFox**.

If payment fails after follow-up or client is unresponsive: **Terminate the account**, apply **$50 reactivation fee**, update **GHL** notes, **Excel Tracker**, and **DisputeFox** with termination status.

Step 6: Documentation and Tracking

- **Excel Tracker**: log all failed payments, retries, client communication, and resolution
- **GHL**: Ensure payment status and client communication are recorded
- **Discord**: Separate channels for Payment Success and Payment Fails for real-time notifications

Payment Extension

Crowned Credit – Payment Extension SOP

This SOP defines the consistent process for handling payment extension requests at Crowned Credit. All Billing team members must follow these steps to grant extensions, maintain records, protect revenue, and ensure full transparency with clients enrolled in recurring monthly plans.

1. Objective

Consistent process for granting extensions while maintaining records, protecting revenue, and ensuring transparency.

2. Scope

All Billing team members managing extension requests. Applies to **recurring monthly plans** (excluding one-time plans like **Momentum**).

Tools / Platforms

Tool	Use
GHL	Billing status, communication
Discord	Payment notifications
Excel Tracker	Extension logging and follow-up status

3. Payment Extension Handling

Step 1: Receive Request

Via email, call, or SMS. Client provides: reason (optional) and desired extension date. Verify current billing status in **GHL** and **Excel tracker**.

> **Eligibility Rules:**
>
> - Leniency on **first payment** if initial billing date differs from signup date
> - Subsequent payments follow regular date — extensions within **7-day grace** only
> - Extensions **cannot exceed 7 days** beyond due date unless case-by-case approved

> ⚠ ***Extensions cannot exceed 7 days*** *beyond the due date. Any exception requires case-by-case manager approval.*

Step 2: Confirm Extension Terms

- Inform client of new deadline
- Inform client about automated follow-up messages and auto-draft schedule
- Document in **Excel tracker**: client name, original due date, extended due date, reason (optional)

Step 3: Payment Failure After Extension

Day	Action
Day 1–3	Auto-draft retry + manual follow-ups
Day 4	Skip
Day 5–7	Manual follow-ups

> ⚠ **Beyond 7-day grace → Termination.** Case-by-case exceptions may extend beyond 7 days.

Step 4: Payment Resolution

Outcome	Action
Payment Succeeds	Send "Thank you" message, update **Excel** and **DisputeFox**
Failure / Unresponsive	Terminate, apply **$50 reactivation fee**, update **GHL / Excel / DisputeFox**

Step 5: Documentation

- **Excel Tracker** — all extension requests, outcomes
- **GHL** — payment notes and communication
- **Discord** — payment channel updates

Special Notes

> ⚠ ***No billing date changes*** *— only extensions within the grace period are permitted.*

> ***If client switches payment methods:***
> - ***Option 1:*** *Pay in advance with new card*
> - ***Option 2:*** *Wait for next active invoice*

Account Upgrade

This page covers the complete process for upgrading clients from the Essentials plan to the Accelerated plan — including payment verification, pricing, invoice creation, DisputeFox updates, and special cases like Momentum upgrades.

Objective

To properly guide clients through upgrading their plan while ensuring accurate billing, clear communication, and correct system updates.

Step 1: Verify Payment Status

Check if the client has already paid for the current month.

Step 2: Determine Upgrade Pricing

Scenario	Upfront Charge	Monthly Going Forward
Client has **NOT** paid for current month	**$199** (discounted from **$249**)	**$199/month**
Client **HAS** already paid (**$99** / **$101.97**)	**$100** (upgrade fee)	**$199/month**

Step 3: Explain to Client

Clearly explain: upfront charge, new monthly rate, and when billing will start. Confirm client approval before proceeding.

Step 4: Important Reminders

- Always verify payment status before quoting
- Avoid confusion by explaining charges clearly
- If unsure, coordinate with the **Billing Team**
- Inform **Billing** of any adjustments made
- Add a **GHL** note after completing the upgrade

Invoice Creation Process

1. **Navigate to:** Payment Tab then All Invoices then + New then New Invoice
2. **Label the Invoice:** Format: **Upgrade - Client Name**
3. **Enter Client Information:** Use the client's **email** for accuracy
4. **Set Due Date:** Based on client's request
5. **Add Product(s):** Select **Accelerated Plan**, choose correct amount (**$199** or **$100**). Do **NOT** apply tax.
6. **Verify total amount:** Should be **$100 or $199 only**
7. **Set delivery method** to **Email** then Click **Send**

> **After payment received:** Update **DisputeFox**, add client name to **Closed Tracker**, leave **GHL** note: "Client upgraded Essentials to Accelerated plan - **$100** / **$199**", inform **Billing Department** for recurring invoice adjustment.

Special Case: Momentum Upgrade

> *“ **Warning:** DO NOT QUOTE PRICE IMMEDIATELY. If client is under **Essentials** or **Accelerated** and wants to upgrade to **Momentum Plan**: Escalate to **Boss Jethro** or **Orlie**. Request account evaluation. Wait for approved pricing/discount.*

Reactivating Client Profile in DisputeFox

1. **Search** for client name and open profile
2. Click on **Account** - if set to **Slow Delete**, update to **Accelerated Plan**
3. Go to **Agreement Pricing** - update: First Payment: **$249**, Monthly Fee: **$199** then Click **Save**
4. Navigate to **Documents and POA** then Locate **Documents Signed** then Click **Resend**
5. Notify client that a new contract has been sent to review and sign

Final Checklist

Payment status verified
Correct pricing quoted
Client approval received
Invoice sent correctly
DisputeFox updated
Contract resent
Billing informed
GHL note added

Account Pause & Suspension

This SOP covers how to handle client-requested account pauses and system-initiated suspensions. Follow this process to protect client relationships, maintain accurate records, and ensure proper system updates in GHL, DisputeFox, and the Masterlist Tracker.

1. Account Pause (Client Requested)

When a client requests a pause:

1. **Ask the reason** for the pause
2. **Offer a remedy** or alternative solution if possible
3. If client **insists**, proceed with the pause

Reactivation Rules:

Timeframe	Fee	Action Required
Within 14 days	No $50 fee — same rate	Must settle any outstanding balance
After 14 days	$50 reactivation fee	Pay fee + outstanding balance
After 2 months	New plan required	Client must re-enroll in a new plan

> ⚠ ***After 2 months of inactivity, a new plan will be required.*** *The client must re-enroll and cannot return at their previous rate.*

2. Account Suspension (System-Initiated)

Suspensions are only triggered by **Credit Monitoring issues** or **Incomplete Onboarding**.

A. Credit Monitoring (CM) Issue

- Inactive for **5 days** → account auto-suspended
- Inactive for **over 14 days** → reactivation fee applies

B. Incomplete Onboarding

- **21-day grace period** given to complete onboarding
- Failure to complete = **suspension**
- Client may resume **without charge** if initial payment was already applied

3. System Updates (Upon Pause or Suspension)

> **Required system actions:**
>
> • **GHL Invoice:** End the recurring payment
> • **DisputeFox:** Archive the account and **turn off the client portal**

4. Resolution

For Credit Monitoring Issue:

1. Confirm **SmartCredit is active and updated** (all 3 bureaus)
2. In DisputeFox: Change status **Archived → Active**
3. Set Folder → **Active**
4. CM Issue → **Select appropriate issue**
5. Portal → **ON**
6. Assigned: **Crowned Credit**
7. Notify client via **WhatsApp**
8. Add **GHL note**
9. Update **Masterlist Tracker:** Suspended → Resolved

For Incomplete Onboarding:

1. Contact **Majorie** (Onboarding Specialist)
2. Update the **onboarding tracker**

Client Scripts

⏸️ PAUSE REQUEST

Hi {{contact.first_name}}, I understand you would like to pause your account. May I ask the reason so I can check if there is a way we can assist you without pausing?

If client still prefers to proceed:
Within 14 days — no fee, same rate. After 14 days — $50 reactivation fee. After 2 months — a new plan will be required.

PAUSE CONFIRMATION (Billing Only)

Thank you {{contact.first_name}}, we truly appreciate the opportunity to have worked with you. We respect your decision to pause your account.

Your account has been paused effective today. All work has been stopped, your portal has been removed, and there will be no further billing.

Reminders:
• Resume within 14 days — no fee
• After 14 days — $50 reactivation fee
• After 2 months — a new plan will be required

Do not hesitate to contact us at (336) 310-0090 anytime.
— Crowned Credit

CM SUSPENSION

Good day {{contact.first_name}}, After several follow-ups, we have not received an update on your credit monitoring, which has caused a delay in processing your account.

Your account has been suspended. Please contact us at (336) 310-0090 to settle and resume your service.
— Best regards, Crowned Credit

REACTIVATION

Hi {{contact.first_name}}, To reactivate your account:

• $50 reactivation fee
• Regular fee: $204.97 (with tax)
• **Total: $254.97**

Please let me know if you would like to proceed.

(Adjust amounts based on the client plan.)
— Best regards, Crowned Credit

🆕 NEW PLAN (OVER 2 MONTHS)

Hi {{contact.first_name}}, Since your account has been inactive for a couple of months, we will need to re-enroll you in a new plan to resume services.

We have some great plan options for you: https://getcrownedcredit.com/pricing

Let me know which plan works best for you!
— Crowned Credit

Account Reactivation

Crowned Credit – Account Reactivation SOP

This SOP outlines the process for reactivating paused, suspended, terminated, or canceled client accounts at Crowned Credit. Billing team members must follow these steps to collect the correct fees, set up invoices properly, and fully restore the client profile in DisputeFox before marking any account as active.

> **Eligibility:** Clients who are **paused, suspended, terminated, or canceled**.

Reactivation Process

Fee Structure & Conditions

#	Deactivation Period	Fee	Tracking
1	**Less than 2 months**	Monthly payment + tax + **$50 reactivation fee** *Example: Essentials $99 + tax = $101.97 + $50 = **$151.97***	Reactivation Tracker
2	**More than 2 months**	Client must sign up as a new client. getcrownedcredit.com/pricing	Closed List Tracker

> *A **$50 reactivation fee** is required for all accounts reactivated within 2 months of deactivation. This fee covers account setup, dispute preparation, and program resumption.*

> ⚠ **More than 2 months deactivated = New Signup.** Direct the client to getcrownedcredit.com/pricing to re-enroll as a new client. Log in the **Closed List Tracker**.

Steps to Set Up Reactivation Invoice (<2 Months)

1. **Open Invoices:** Payment Tab → All Invoices → **+NEW** → **NEW INVOICE**
2. **Label the Invoice:** Set label to **"Reactivation"**
3. **Enter Client Info:** Use client email to look up the account
4. **Set Due Date:** Per client's requested date
5. **Add Products:** Previous plan (e.g., Essentials = $99) + Apply tax. Add **Reactivation Fee: $50** (no tax) via + icon.
6. **Verify Total:** Confirm total (**$151.97 for Essentials**)
7. **Send Invoice:** Deliver via Email

> **Once Payment Received:** Assist client until fully set up. Update GHL notes: "*Client reactivated* → *Active*". Send confirmation message.

Steps for >2 Months Deactivated (New Signup Flow)

1. **Open Invoices:** Payment Tab → All Invoices → **+NEW** → **NEW INVOICE**
2. **Label:** Leave as **"NEW INVOICE"**
3. **Enter Client Info:** Use client email
4. **Set Due Date:** Per client's request
5. **Add Product:** Client's selected plan (Essentials/Accelerated/Momentum), verify upfront amount. **Do not apply tax.**
6. **Verify Total:** Confirm ($150 for Essentials/Momentum)
7. **Send Invoice:** Deliver via Email

> **Once Payment Received:** Same steps as above — assist client, update GHL notes, send confirmation.

5. Reactivating Client Profile in DisputeFox (DF)

1. **Search Client:** Search for client name in DisputeFox
2. **Handle Overdues:** If showing import overdues — get most recent credit report, update file with previous rounds left out
3. **Change Status:** Set **Archived → Active**
4. **Move Folder:** Move to Folder: **Active Client**
5. **Portal Settings:** Turn **ON**
6. **Check Profile:** Verify Status (Slow Delete of EM or Accelerated), Password (format Name123 e.g. *Khryzza123*), Credit monitoring logins (functional, up to date with 3B)
7. **Assign Account:** Assign to **Crowned Credit 4**
8. **Notify Team:** Inform GC WhatsApp / Dianna Dispute Team that client is active and ready for import
9. **Update Tracker:** Update Reactivation Google Sheet Tracker for commission

Notes & Reminders

> “
> - *Always **confirm client requested due dates** before sending invoice.*
> - ***Double-check totals** including reactivation fee and tax.*
> - *Ensure accounts and **portal are fully functional** before marking active.*
> - *Keep documentation for **tracking, auditing, and commission**.*
> - ***Track by period:** <2 months = Reactivation Tracker | >2 months = Closed List Tracker*

Marking Client Payments as Paid

Marking Client Payments as Paid — SOP

This SOP ensures accurate and timely payment processing for all Crowned Credit clients. Billing team members must verify, acknowledge, mark, and confirm every payment received — whether via website, Zelle, or Cash App — to prevent duplicate billing and maintain clean records.

Scope

Payment Source	Notes
Website Purchase	Automatically logged; verify in GHL against invoice
Zelle	Manual confirmation required; notify billing department
Cash App	Manual confirmation required; notify billing department

Procedure

Step 1 — Review Payment Notification

Verify notification from source. Confirm **client name**, **payment amount**, and ensure it matches the correct invoice/account.

Step 2 — Acknowledge the Notification

React to the payment notification with a check mark to indicate payment is being reviewed and processed. This signals to the team that it's being handled.

Step 3 — Mark Invoice as Paid

Once fully verified, locate the corresponding invoice in **GHL** and update the status to **"Paid"**.

Step 4 — Confirm Completion

Reply directly to the same notification with:

> **Confirmation Response**
>
> "Marked as paid."

This ensures **visibility, accountability, and confirmation** for the entire team.

Important Notes

> ⚠ ***Always verify payment details BEFORE marking as paid.***
>
> - ***Do not mark without confirmation.*** *Unverified markings can cause duplicate billing or missed updates.*
> - *Complete all updates* ***promptly*** *to maintain accurate records.*
> - *If source is* ***Zelle or Cash App*** *— manual verification is always required before any action.*