

# 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)

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### Required system actions:

- **GHL Invoice:** End the recurring payment
- **DisputeFox:** Archive the account and **turn off the client portal**

# 4. Resolution

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### 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

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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

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