

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*“ **Warning:** DO NOT QUOTE PRICE IMMEDIATELY.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

Revision #6

Created 2026-04-01 18:31:44 UTC by Admin

Updated 2026-04-28 21:06:16 UTC by Admin