

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
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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
Void BEFORE creating new invoice	Prevents double billing — no exceptions

Reminder	Details
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

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