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*

Revision #5
Created 2026-04-01 18:31:42 UTC by Admin
Updated 2026-04-28 21:06:12 UTC by Admin