

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.

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