

Payment Methods

This page covers Payment Methods at Crowned Credit — accepted and restricted payment options, autopay setup, payment verification steps, and tracking protocols.

1. Objective

Define accepted payment methods and ensure proper handling, verification, and recording of all client payments.

2. Scope

All client payments including **setup fees** and **monthly billing**.

3. Accepted & Restricted Payment Methods

Method	Status	Notes
Card	<input type="checkbox"/> Accepted	Auto-draft via GHL
Zelle	<input type="checkbox"/> Accepted	Manual verification required
Cash App	<input type="checkbox"/> Accepted	Manual verification required
American Express (Amex)	<input type="checkbox"/> Restricted	Guide client to an alternative method
Discover	<input type="checkbox"/> Restricted	Guide client to an alternative method

4. Autopay vs Manual

Autopay Info: Autopay is the default for all recurring clients. Default draft time is **3:00 PM EST**. Clients may request manual payment if needed.

5. Payment Verification

1. **Card Payments (GHL):** Auto-recorded in **GoHighLevel**. Team notified automatically via **Discord**.
2. **Zelle / Cash App:** Verify via **Discord notifications**, client-provided proof, or **Truist Alerts** in **GHL**.
3. **Mark Invoice Paid:** Once confirmed, mark invoice as paid in **GHL** and update the internal tracker.

“ **Warning:** Never mark a payment as paid without confirmation. Refer to: *Marking Client Payments as Paid SOP*.”

6. Payment Issues

Request proof of payment from the client and cross-check all records before taking action.

See also: Failed Payment Handling SOP for full step-by-step instructions.

7. Tracking

All payments tracked across: **GHL, Discord (Payment Channels)**, and the **Internal Tracker**.

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