Payments in GHL (Navigating the Payments section)

This page covers navigating the Payments section in GoHighLevel (GHL) — including how to access invoices, review transactions, record payments, and follow best practices for accurate billing management.

1. Overview

The **Payments** section in **GoHighLevel (GHL)** provides visibility on:

- All transactions (successful and failed)
- Invoice status
- Payment method used
- Date and amount

Scope: All team members responsible for reviewing transactions, verifying payments, updating client payment statuses, following up on failed payments, and managing terminations and reactivations.

2. Accessing the Payments Section

> ◫ **Navigation:** Log in to **GHL** → Left-side menu → Click **Payments**

Available Tabs:

- **Invoices & Estimates**
- **Transactions**
- **All Documents & Contracts**

3. Navigating the Payments Tabs

3.1 Invoices Tab

Navigate to **Payments → Invoices & Estimates** to view all client invoices.

Field	Description
Invoice Name	Name of the invoice
Number	Invoice reference number
Customer Name	Client associated with invoice
Issue Date	Date invoice was issued
Amount	Total invoice amount
Status	Paid, Overdue, Draft, Sent, Payment Processing, Partially Paid, Void

Search: Use the Search bar → Enter client name or email → Select invoice.

Filter: Click **Filters** → Select status.

> **Tip:** Always check the **Overdue** filter to cross-reference with the internal overdue tracking list.

3.2 Invoice Actions

Click the three dots (⋮) beside any invoice to access available actions:

Action	Description	When to Use
View	Open invoice in read-only mode	Reviewing a paid invoice
Edit in New Tab	Open invoice for editing	Unpaid/processing invoices needing corrections
Copy Link	Copy the invoice payment link	Sending link to client via SMS
Download	Save invoice as PDF	Archiving or sharing documentation
Record Payment	Manually confirm payment or charge a card	Payment received externally
Clone	Duplicate the invoice	Creating a similar invoice
Convert to Template	Save as reusable template	Standardizing recurring formats

Action	Description	When to Use
View Transaction	See associated payment transaction	Verifying paid invoice transaction
Void	Permanently cancel the invoice	Only when fully cancelling — IRREVERSIBLE

> *“* ***WARNING: Void = Permanently cancels*** *the invoice. This action cannot be undone. Use with extreme caution and only when absolutely necessary.*

3.3 Recording Payments

Click **Record Payment** and choose your method:

Method	When to Use
Charge a Card	Directly charge client's credit/debit card on file
Record Manually	Payments already received via **Zelle**, **Cash App**, or Website

> Only use **Record Manually** if payment has already been confirmed outside of **GHL**.

3.4 Transactions Tab

Navigate to **Payments → Transactions** to verify payment activity:

- View successful and failed payments
- Identify payment status, amount, date, and last 4 digits of card
- Check when verifying if payment went through or why it failed

3.5 All Documents & Contracts Tab

Navigate to **Payments → All Documents & Contracts** to confirm signed agreements and review stored contracts.

4. Best Practices

> **Best Practices for Payments in GHL:**

- Always **double-check** before using **Void** or **Record Payment**
- Use **Search** instead of scrolling
- Search by **email** for more unique client lookup
- Regularly review the **Overdue** filter
- Ensure invoice details (client name + plan) are accurate
- Cross-check **Transactions** before marking payment manually

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