

Setup Fees

This page covers **Setup Fees at Crowned Credit** — the one-time charge required before client onboarding begins, including fee structure, process flow, refund policy, and exceptions.

1. Objective

To ensure accurate, consistent, and timely collection of setup fees upon client enrollment, while maintaining clear coordination between **Sales** and **Billing** teams and preventing onboarding of unpaid accounts.

2. Scope

This SOP applies to all clients enrolling in any service package and covers the process of invoicing, collecting, verifying, and recording setup fee payments using **GoHighLevel**, including payments made via **invoice**, **website purchase**, **Zelle**, and **Cash App**.

3. Definition: Setup Fee

A one-time, non-recurring charge applied upon client enrollment. The setup fee is required before onboarding begins and covers **initial account preparation** and the **first round of disputes**.

4. Setup Fee Structure (Per Package)

Service	Upfront	Monthly
Essential Membership (Solo)	\$150 +tax	\$99 +tax
Essential Membership (Couple)	\$250 +tax	\$175 +tax (Individual: \$87.50 +tax)
Essential Membership (Family of 3)	\$350 +tax	\$262 +tax

Service	Upfront	Monthly
Accelerated Membership (Solo)	\$249 +tax	\$199 +tax
Accelerated Membership (Couple)	\$400 +tax	\$350 +tax
Momentum Membership (One-Time)	\$1,095	—

5. Process Flow

1. **Client Agreement:** Client expresses intent to proceed with a selected package.
2. **Invoice Creation / Payment Direction:** **Sales** creates an invoice in **GoHighLevel** OR directs the client to the website: <https://getcrownedcredit.com/pricing>
3. **Payment Collection:**
 - **A. Invoice Payment:** Client pays invoice — system automatically tags client as **Won**.
 - **B. Website / Zelle / Cash App Payment:** **Billing team** verifies payment notification in **Discord**. Follow internal SOP: *Marking Client Payments as Paid*.
4. **Onboarding Eligibility:** Confirm setup fee is paid before proceeding to onboarding.

“ **Note:** Onboarding *ONLY* begins after setup fee is paid. Unpaid clients remain in follow-up stage under Sales.

6. Refund Policy

“ **Note:** Setup fee is refundable within **3 days** of payment. The client must notify within the 3-day window as stipulated in the agreement.

7. Exceptions & Special Cases

- **A. Partial Payment:** We allow clients to proceed with onboarding once the first half is paid.
- **B. Duplicate Payments:** Notify **Billing** immediately. Do not process refund without approval.
- **C. Payment Not Found:** Request proof of payment from client. Check **Truist Alerts** in **GoHighLevel Conversations**.

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