

CTTK

Common uses cases for Payments and Invoices



Payments are used to pay for goods or services. They can be made by credit card, debit card, bank transfer, cheque, cash, or any other method of payment.

Invoices are used to record the amount that has been paid for a product or service. The invoice is usually sent with the payment so that it can be tracked as part of the accounting process.

In this article we will go over some common or popular use cases for using payments and invoices:

Charging a card while on the phone with a customer without sending an invoice

Step 1: Create an invoice by selecting the contact. If the contact does not exist, add the contact on the fly.

Step 2: Add the product that is being sold, if the product is not listed in the dropdown, choose "Add New Item"

Step 3: On the invoice builder page, instead of sending the invoice, click on the three dots at the top bar. Click on "Record Payment"

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New Invoice ⋮ Save Send ⋮

Preview

Record Payment

INVOICE

Nasa Customer Service
+15037081210
272 Elan view Lane
San Jose , CA
95035

United States ⋮
<https://change2.com>

Billed to Remove

Company Name
Test Mctesterson

Address

City , State

Zip code

United States ⋮

Invoice No
inv_ 0000005155

Issue Date
08/22/2022

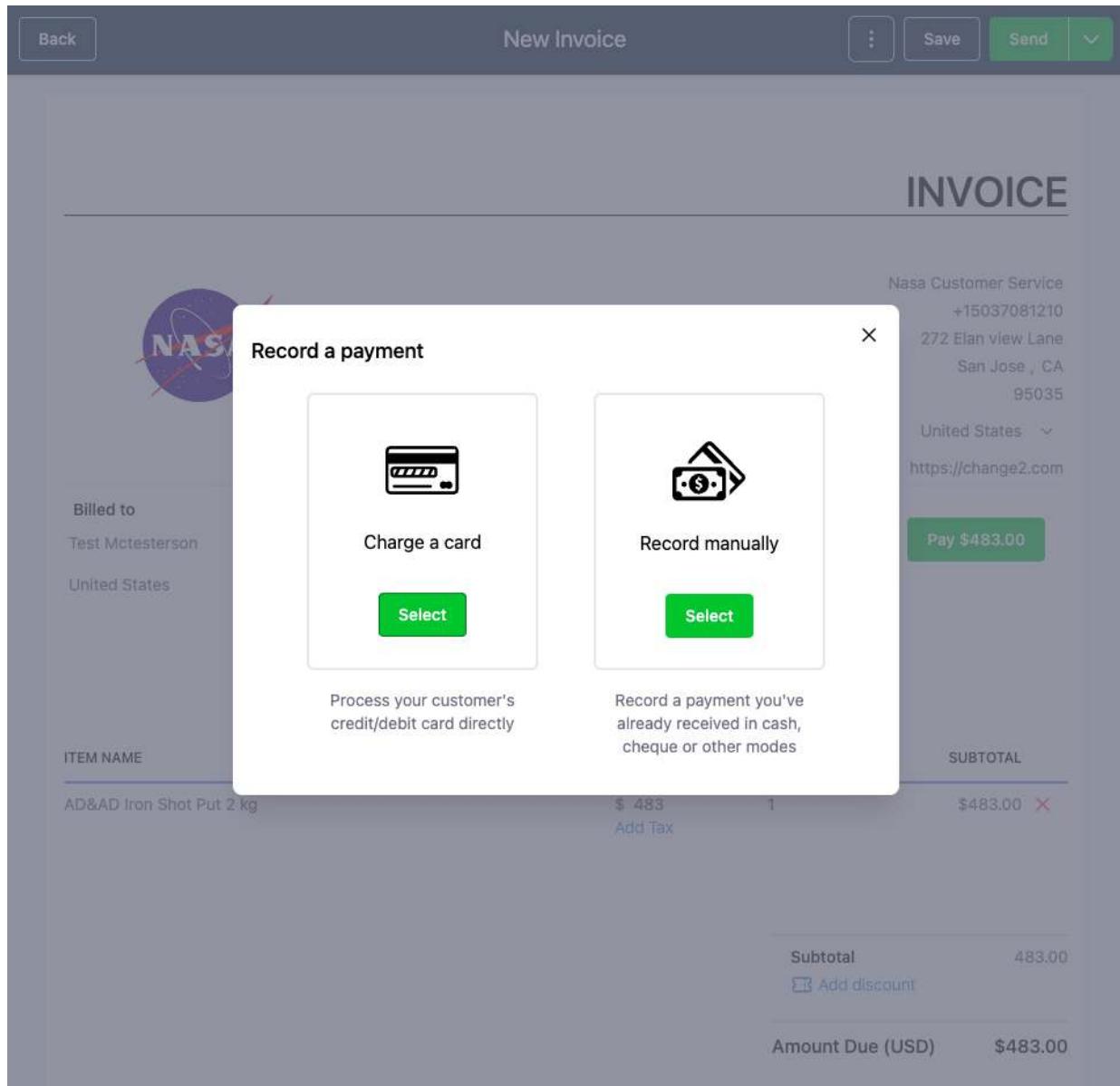
Due Date
09/04/2022

Pay \$483.00

ITEM NAME	PRICE	QTY	SUBTOTAL
AD&AD Iron Shot Put 2 kg Item description	\$ 483 Add Tax	1	\$483.00 ×
+ Add an item			
Subtotal		483.00	
Add discount			
Amount Due (USD)		\$483.00	

Step 4: On the next modal window, choose "Charge a card" and on the next screen, choose "New Card" if this is a first-time customer.

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The screenshot shows a mobile application interface for managing invoices. At the top, there are buttons for 'Back', 'New Invoice', and 'Save/Send'. The main screen displays an 'INVOICE' for a customer named 'Nasa Customer Service' located in San Jose, CA. The invoice subtotal is \$483.00. A modal window titled 'Record a payment' is overlaid on the screen, containing two options: 'Charge a card' (with a credit card icon) and 'Record manually' (with a cash icon). Each option has a 'Select' button. Below the options, there is descriptive text: 'Charge a card' says 'Process your customer's credit/debit card directly', and 'Record manually' says 'Record a payment you've already received in cash, cheque or other modes'.

Step 5: If this customer has already purchased, then the saved cards section will have the card used before.

INVOICE

Nasa Customer Service
+15037081210
272 Elan view Lane
San Jose, CA
95035
United States
<https://change2.com>

Pay \$483.00

Subtotal 483.00
[Add discount](#)

Amount Due (USD) \$483.00

ITEM NAME

AD&AD Iron Shot Put 2 kg

Cancel Confirm & Charge

Please Note:

Customers being charged will not receive any automated email/text confirmation.

Using invoices for recording manual payments without Stripe Connect

You can use invoicing solution without stripe connect as well. However, to receive any payments done via credit/debit cards, Stripe Connect is needed.

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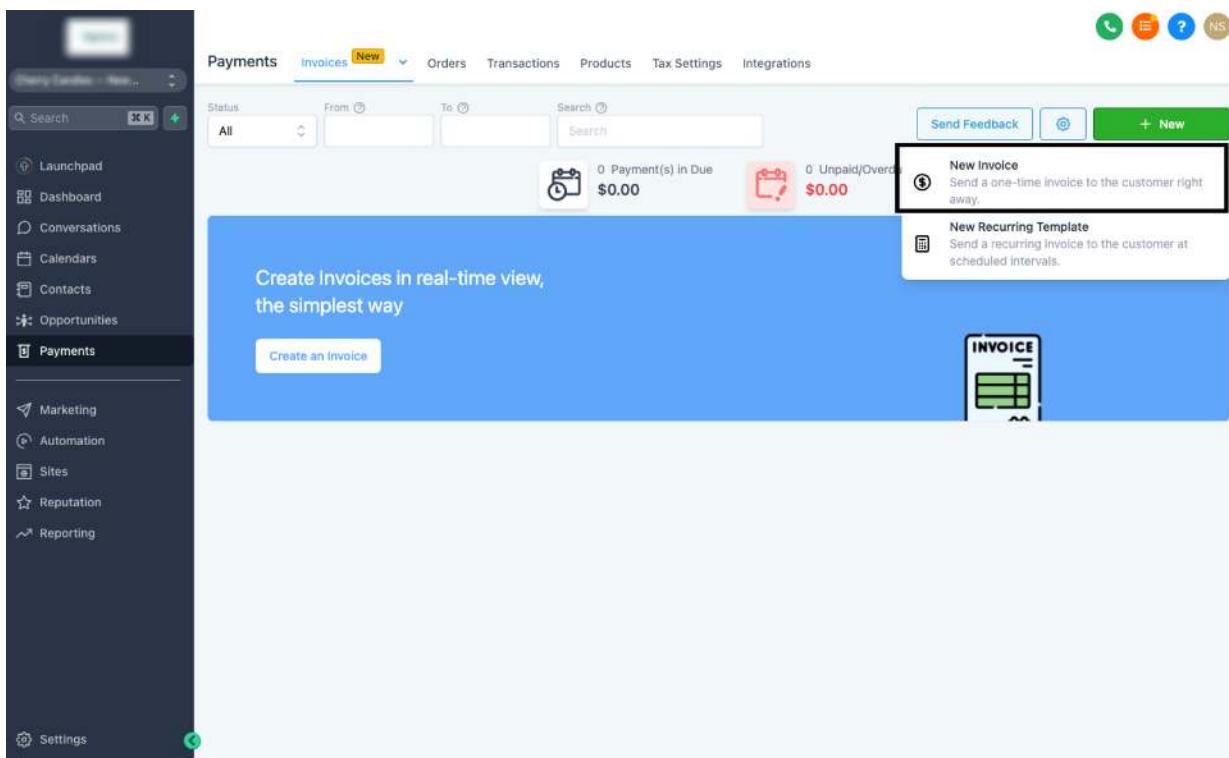
Please Note:

If you opt to use invoicing without Stripe Connect you will be required to manually record and collect payments.

For now, recording

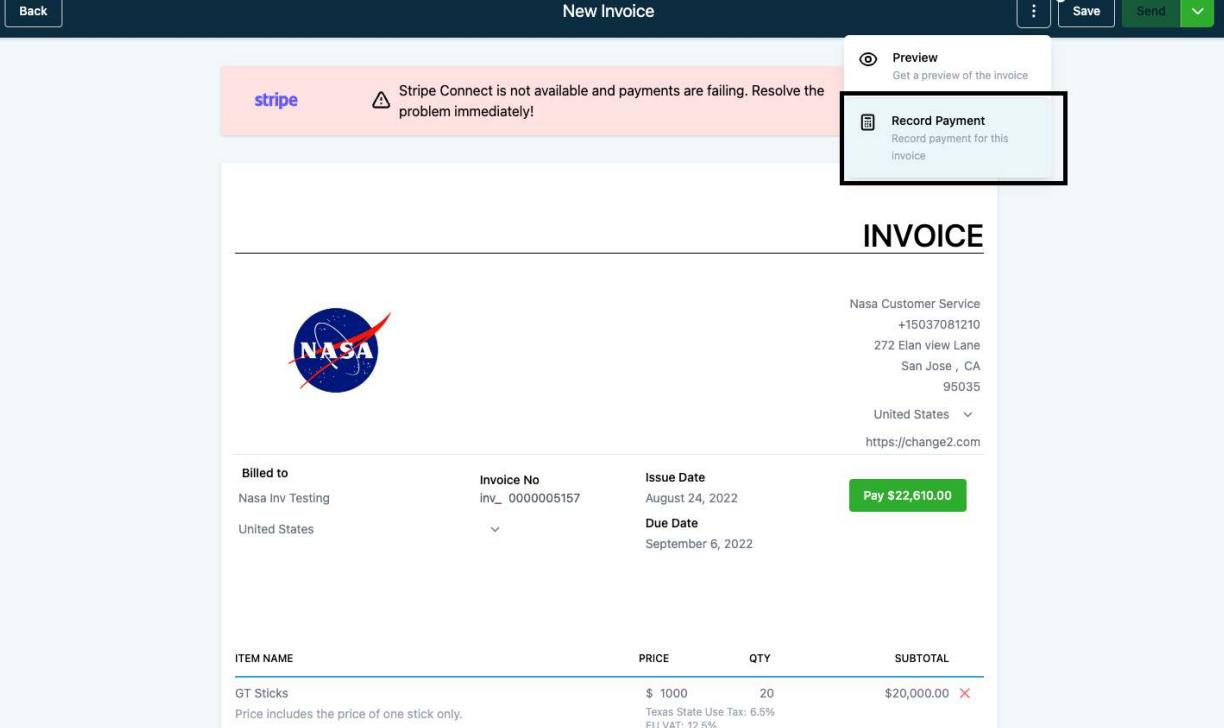
manual payments without Stripe Connect works only for one-time invoices.

Step 3: Proceed to create the new invoice via the "New" button and choose "New Invoice".



Step 4: On the invoice builder page, add the customer details, add the products/services sold, tax info, and discounts if any. Once you are ready click on the three dots and choose the "Record Payment" option

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stripe ⚠ Stripe Connect is not available and payments are failing. Resolve the problem immediately!

New Invoice

Back

Save Send

Preview
Get a preview of the invoice

Record Payment
Record payment for this invoice

INVOICE

NASA Customer Service
+15037081210
272 Elan view Lane
San Jose , CA
95035
United States ▼
<https://change2.com>

Billed to
Nasa Inv Testing
United States

Invoice No
inv_ 0000005157

Issue Date
August 24, 2022

Due Date
September 6, 2022

Pay \$22,610.00

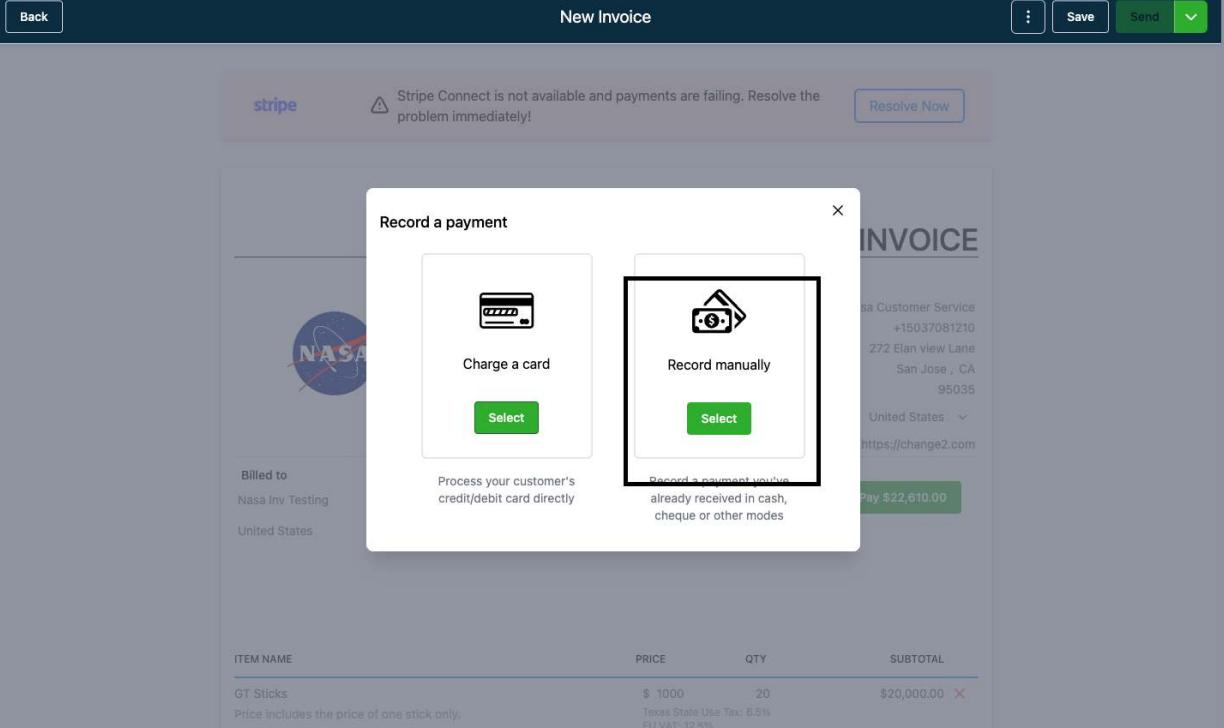
ITEM NAME PRICE QTY SUBTOTAL

GT Sticks \$ 1000 20 \$20,000.00 ×

Texas State Use Tax: 6.5%
EU VAT: 12.5%

[Add Tax](#)

Step 5: Choose "Record Manually"



stripe ⚠ Stripe Connect is not available and payments are failing. Resolve the problem immediately! Resolve Now

New Invoice

Back

Save Send

Record a payment

Charge a card Select

Process your customer's credit/debit card directly

Record manually Select

Record a payment you've already received in cash, cheque or other modes

INVOICE

NASA Customer Service
+15037081210
272 Elan view Lane
San Jose , CA
95035
United States ▼
<https://change2.com>

Pay \$22,610.00

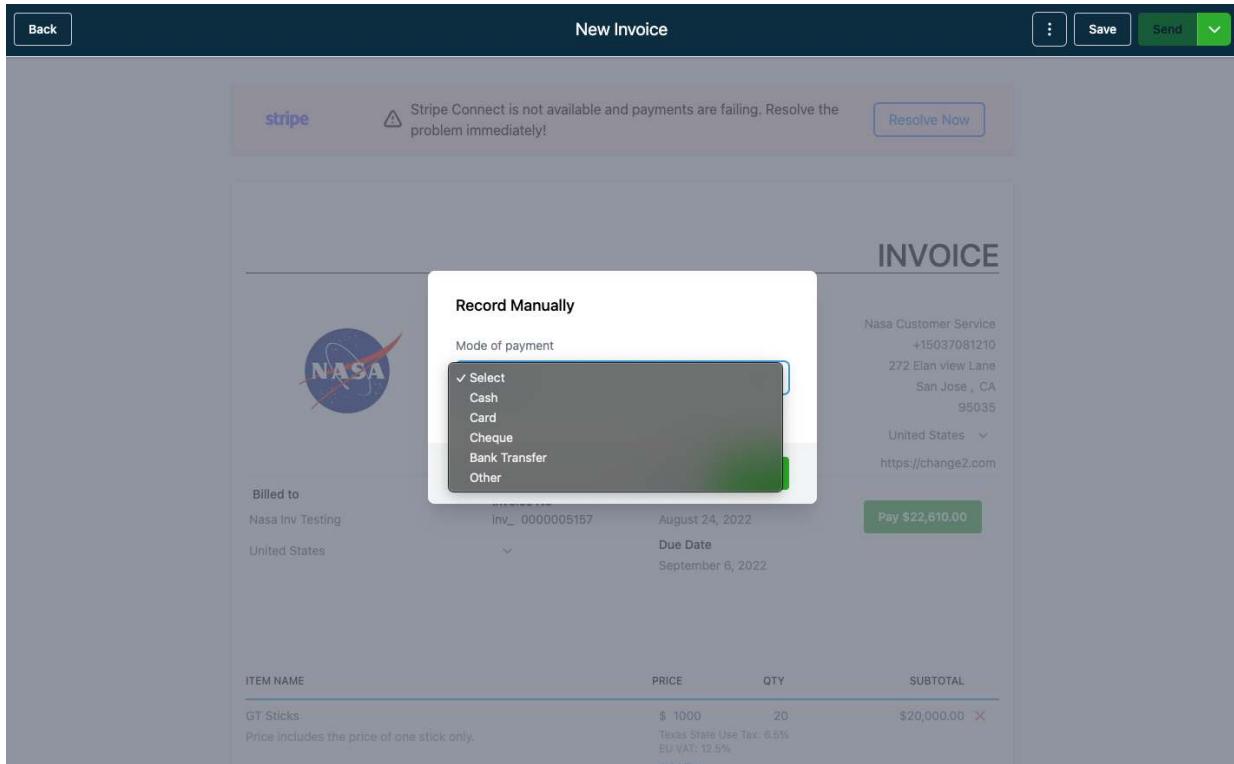
Billed to
Nasa Inv Testing
United States

ITEM NAME PRICE QTY SUBTOTAL

GT Sticks \$ 1000 20 \$20,000.00 ×

Texas State Use Tax: 6.5%
EU VAT: 12.5%

Step 6: The next screen will show options like - Cash, Card, Check, Bank Transfer, and Other. Choose the option that applies and click "Submit" on the next screen

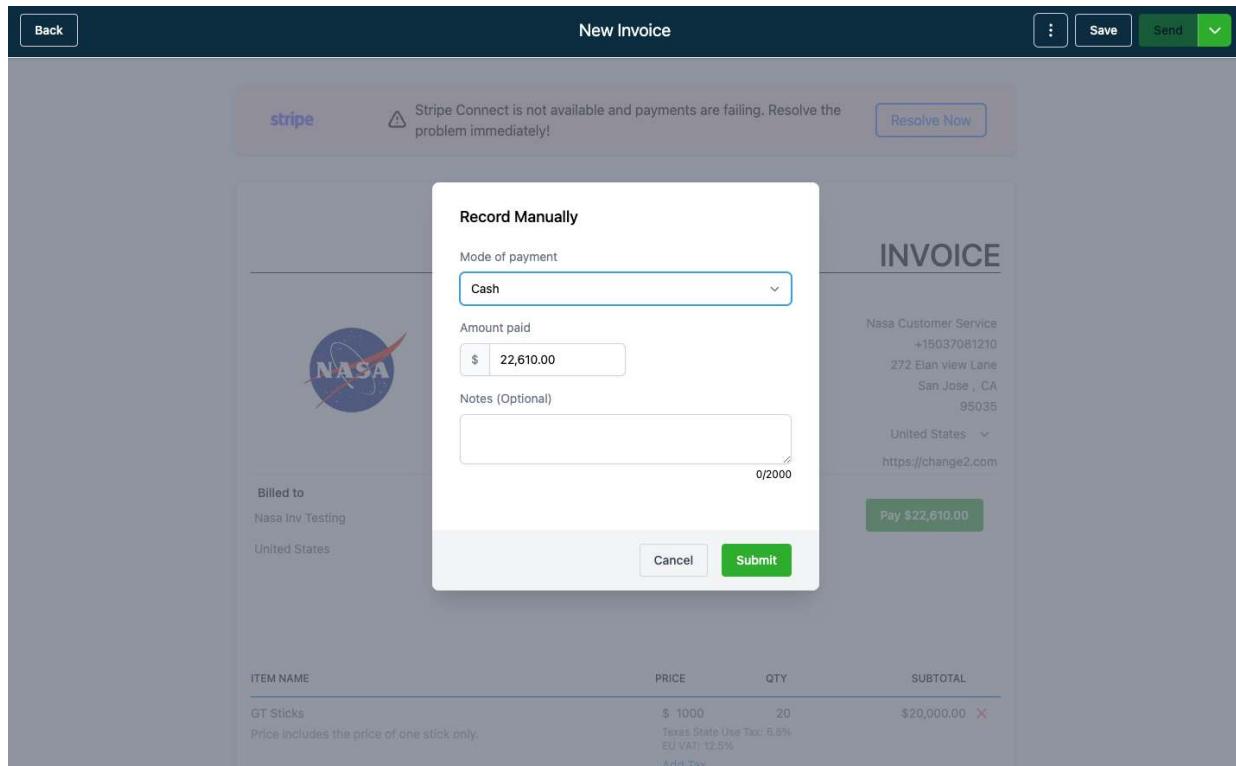


Step 7: Now the invoice will be recorded for that customer

Please Note:

Customers being charged will not receive any automated email/text confirmation.

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If you don't have the services or products created in the products area of HighLevel, and you still want to add it to the invoice, you can do so by following the steps given below.

Step 1

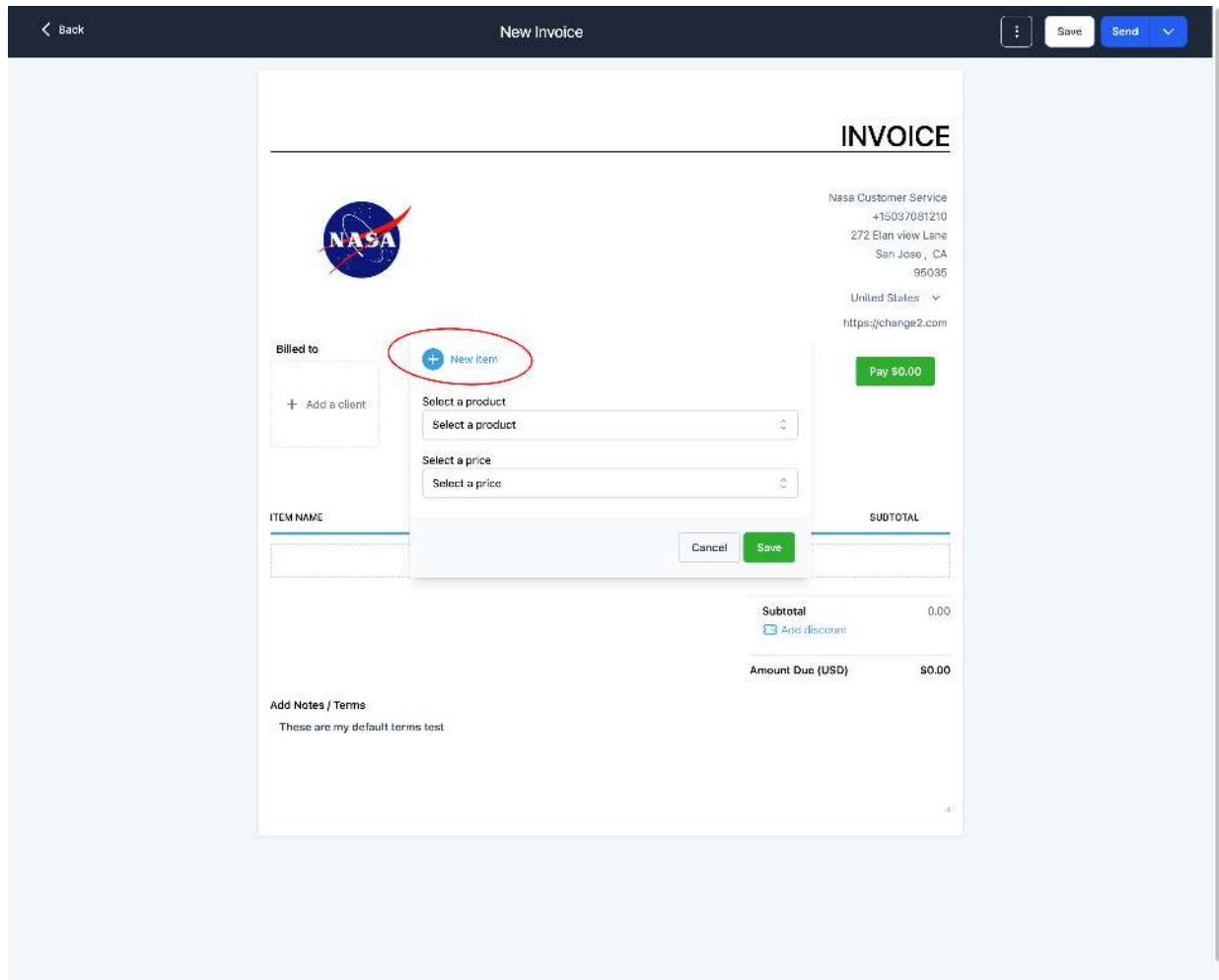
Create an invoice and Click "Add an Item"

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Step 2

Choose "New Item" to add an item that is not present in your "Products"

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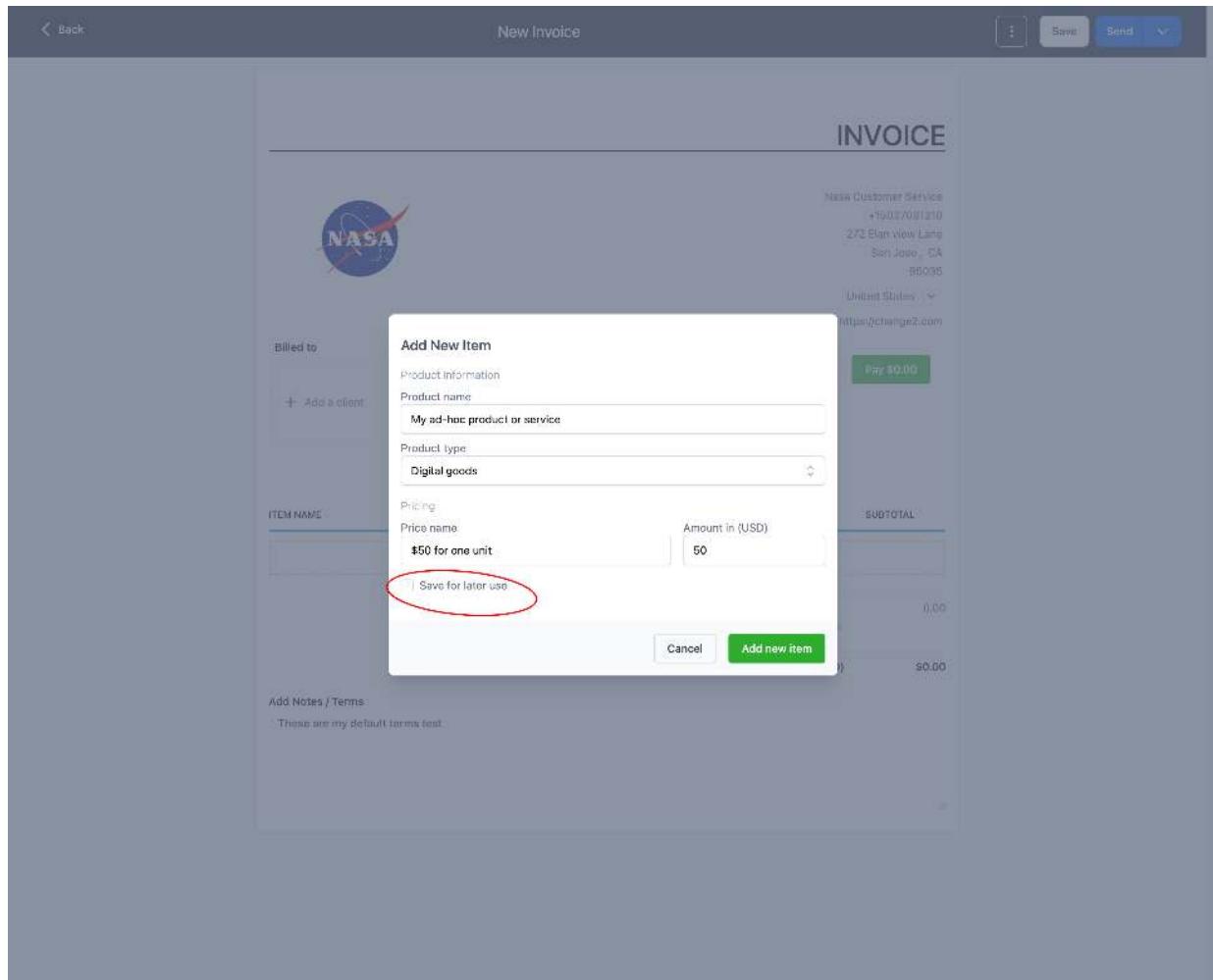


The screenshot shows a software interface for creating a new invoice. At the top, there is a header with a 'Back' button, the text 'New Invoice', and three buttons: 'Save', 'Send', and a dropdown menu. The main area is titled 'INVOICE' and features a NASA logo. On the left, there is a 'Billed to' section with a 'New Item' button highlighted by a red oval. Below this are fields for 'Select a product' and 'Select a price'. On the right, there is customer information for 'Nasa Customer Service' and a 'Pay \$0.00' button. The bottom section is for adding items, with 'ITEM NAME' and 'SUBTOTAL' fields. A 'Save' button is located at the bottom right of this section. The right side of the screen displays the invoice header 'INVOICE' and customer details: 'Nasa Customer Service', '+15037081210', '272 Elan view Lane', 'San Jose , CA 95035', 'United States', and 'https://change2.com'. There is also a 'Pay \$0.00' button on the right side of the main form.

Step 3

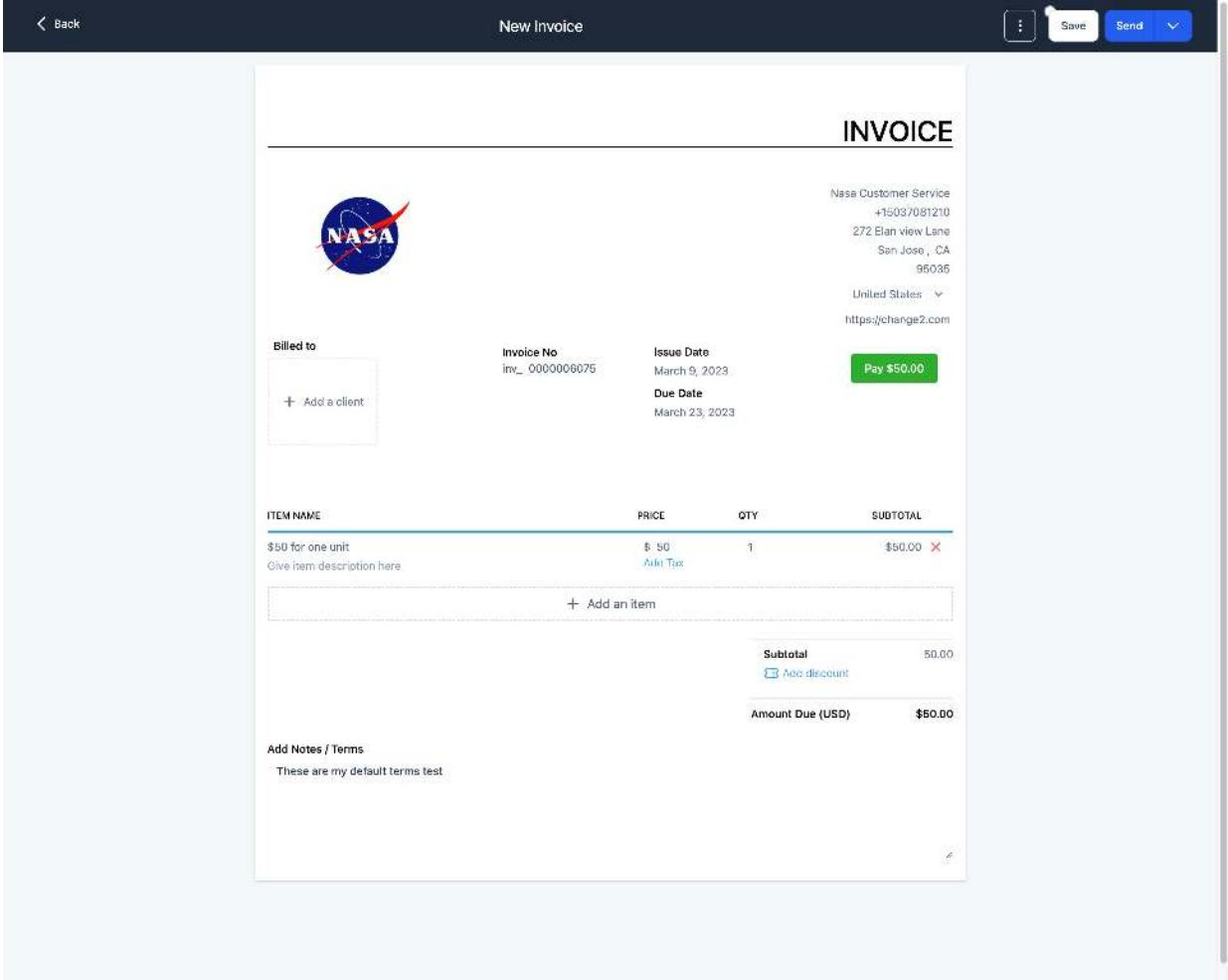
- On the next screen enter the product name and the price name.
- If you want to save this for later use, you can select the option "**Save for later use**". This will save this product/service in your products area.
- Click on "**Add new item**" button to add it to the invoice

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This new item will be added to your invoice and ready to be sent!

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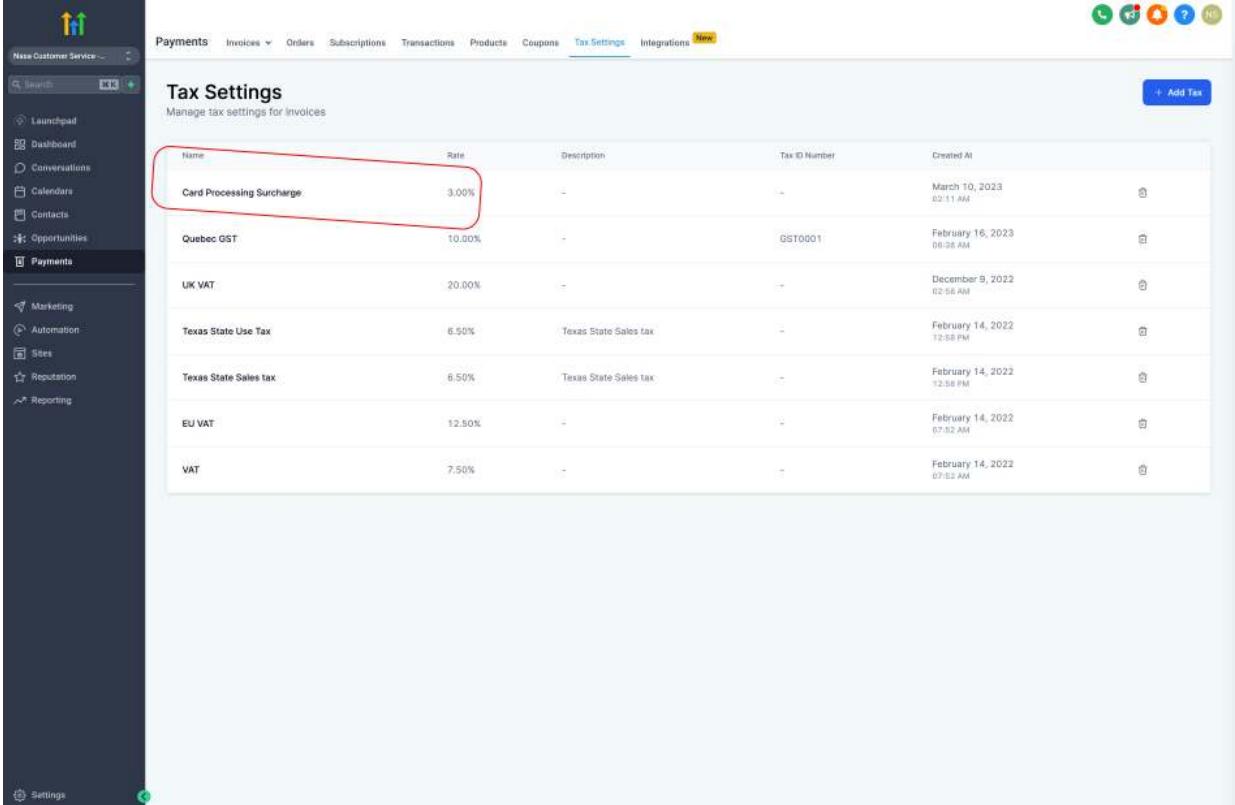


The screenshot shows a software interface for creating a new invoice. At the top, there are buttons for 'Back', 'New Invoice', and 'Save/Send'. The main area is titled 'INVOICE' and features a NASA logo. Customer service information is listed: Nasa Customer Service, +15037081210, 272 Elan view Lane, San Jose , CA 95035, United States. The URL https://change2.com is also present. The 'Billed to' section has a placeholder for 'Add a client'. The 'Invoice No' is inv_ 0000000075, 'Issue Date' is March 9, 2023, and 'Due Date' is March 23, 2023. A green button labeled 'Pay \$50.00' is visible. Below this, a table shows an item: '\$50 for one unit' with a price of '\$ 50' and a quantity of '1', resulting in a subtotal of '\$50.00'. There is a link to 'Add an item'. At the bottom, there are buttons for 'Subtotal' (\$50.00), 'Add discount', 'Amount Due (USD)' (\$50.00), and a note section with the text 'These are my default terms test'.

How to add the card processing fee to my invoices

Go to Payments > Tax Settings and add a card processing fee that you would like to add charge as a "tax"

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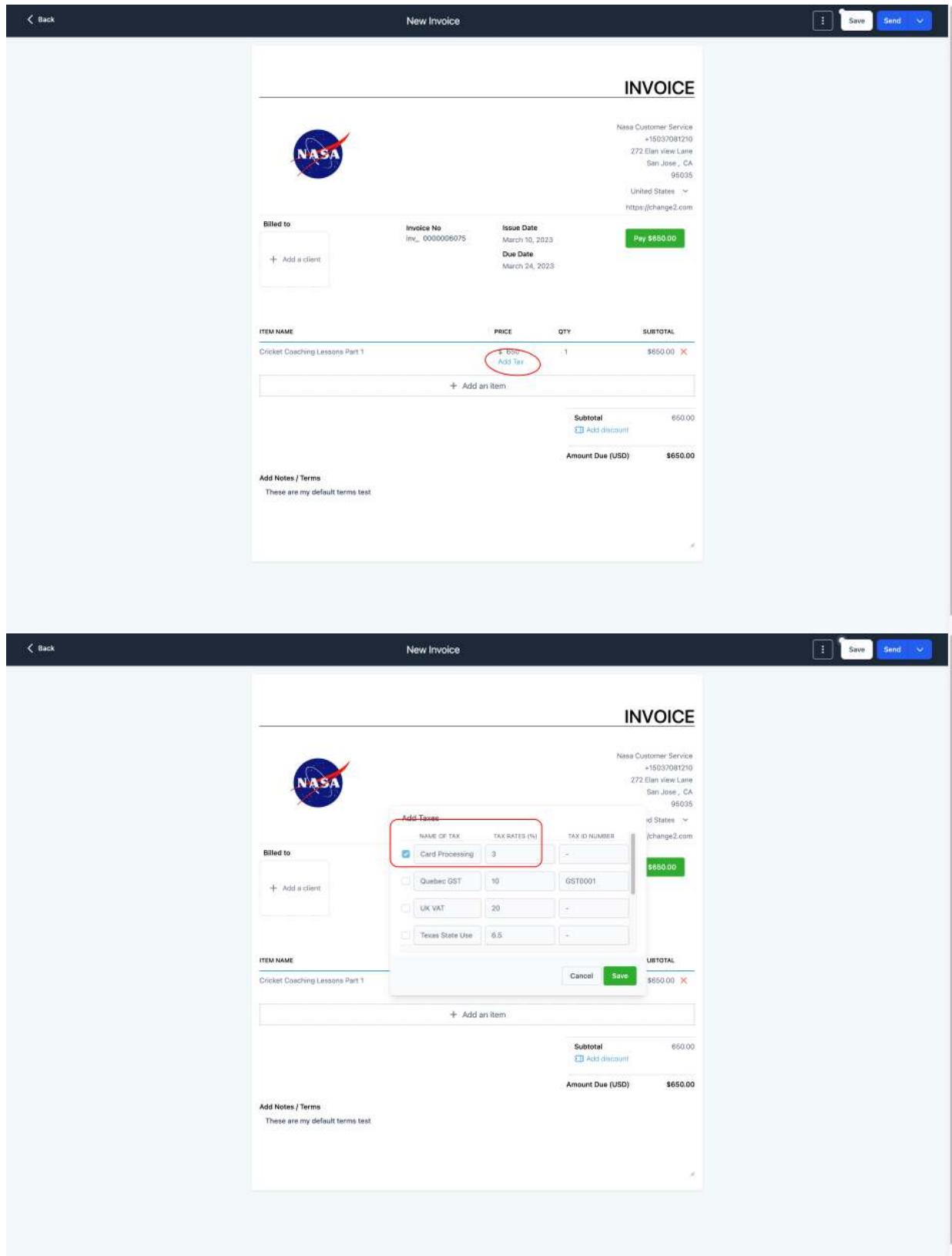
The screenshot shows a software interface for managing tax settings. The left sidebar includes links for Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Payments, Marketing, Automation, Sites, Reputation, and Reporting. The main content area is titled 'Tax Settings' and shows a table of tax configurations. The table has columns for Name, Rate, Description, Tax ID Number, and Created At. A red box highlights the first row, 'Card Processing Surcharge', which has a rate of 3.00%. Other rows include 'Quebec GST' (10.00%), 'UK VAT' (20.00%), 'Texas State Use Tax' (6.50%), 'Texas State Sales Tax' (6.50%), 'EU VAT' (12.50%), and 'VAT' (7.50%). The 'Created At' column shows dates ranging from February 14, 2022, to March 10, 2023.

Name	Rate	Description	Tax ID Number	Created At
Card Processing Surcharge	3.00%			March 10, 2023 02:11 AM
Quebec GST	10.00%		GST0001	February 16, 2023 06:38 AM
UK VAT	20.00%			December 9, 2022 02:56 AM
Texas State Use Tax	6.50%	Texas State Sales tax		February 14, 2022 12:58 PM
Texas State Sales Tax	6.50%	Texas State Sales tax		February 14, 2022 12:58 PM
EU VAT	12.50%			February 14, 2022 07:52 AM
VAT	7.50%			February 14, 2022 07:52 AM

Create a new invoice and add the item that you want to charge for.

Click on Add Tax and select the card processing fee that you configured in the tax settings and click "Save"

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The screenshots illustrate the process of adding a card processing charge to an invoice. In the first screenshot, a single item is listed with a tax line. In the second screenshot, the 'Card Processing' tax line has been added, appearing in a red-highlighted box. The tax line includes fields for 'NAME OF TAX', 'TAX RATES (%)', and 'TAX ID NUMBER'.

Invoice Details (Top Screenshot):

- Billed to:** NASA Customer Service
- Invoice No:** inv_ 0000006075
- Issue Date:** March 10, 2023
- Due Date:** March 24, 2023
- Subtotal:** \$650.00
- Amount Due (USD):** \$650.00

Item List (Top Screenshot):

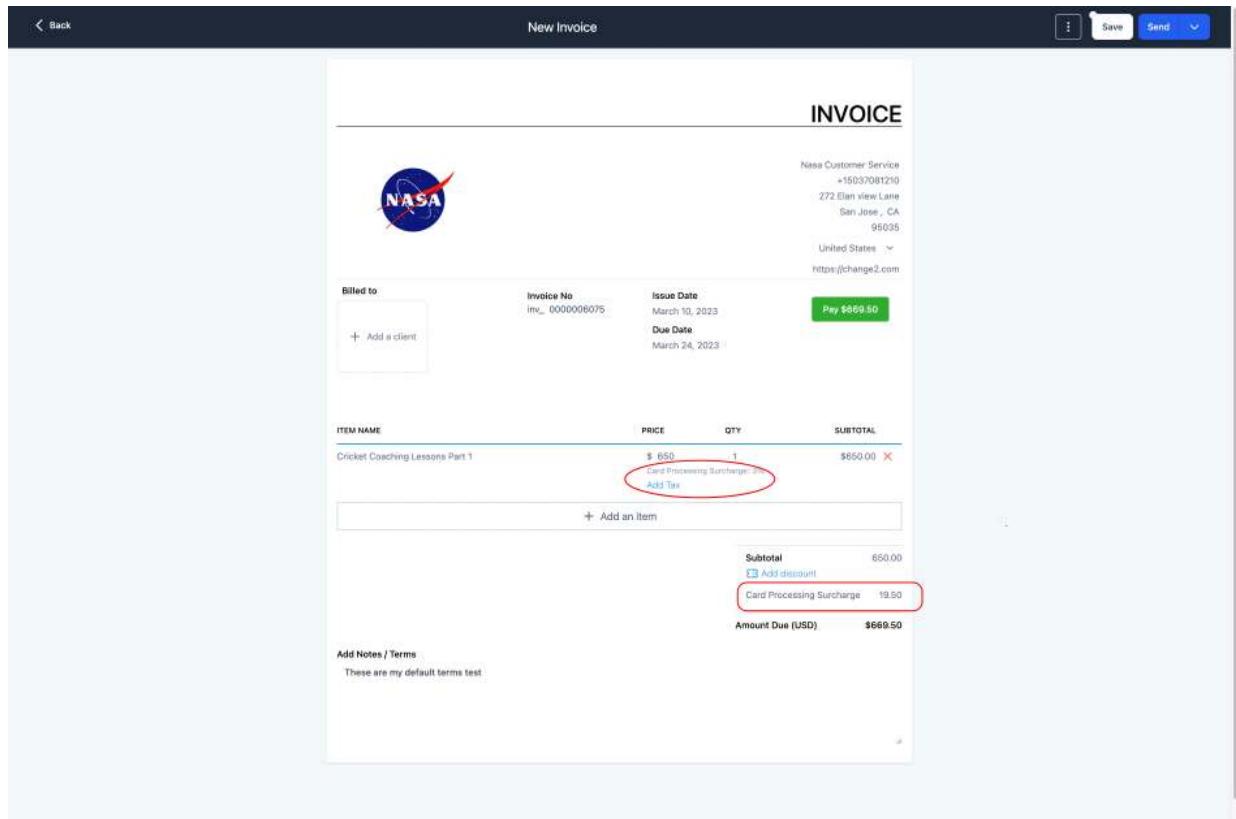
ITEM NAME	PRICE	QTY	SUBTOTAL
Cricket Coaching Lessons Part 1	\$650.00	1	\$650.00

Tax Lines (Bottom Screenshot):

NAME OF TAX	TAX RATES (%)	TAX ID NUMBER
Card Processing	3	
Quebec GST	10	GSTB001
UK VAT	20	
Texas State Use	6.5	

Once the card processing charge is added, it will show up in the invoice builder like this

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Here is what the payer would see in the invoice

