

CITK

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"

Common uses cases for Payments and Invoices

Back

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 <small>Item description</small>	\$ 483 Add Tax	1	\$483.00 ×
<div>+ Add an item</div>			

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.

Common uses cases for Payments and Invoices

Back New Invoice Save Send

INVOICE

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

Pay \$483.00


Billed to
Test Mctesterson
United States

ITEM NAME

AD&AD Iron Shot Put 2 kg	\$ 483	1	\$483.00
	Add Tax		

Subtotal 483.00
Add discount
Amount Due (USD) \$483.00


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

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

The screenshot shows a 'New Invoice' interface. At the top, there's a 'Back' button, the title 'New Invoice', and buttons for 'Save', 'Send', and a dropdown arrow. The main content area is divided into three sections. On the left, there's a 'Billed to' section with a NASA logo, the name 'Test Mcteserson', and 'United States'. Below this is an 'ITEM NAME' section with 'AD&AD Iron Shot Put 2 kg'. On the right, there's an 'INVOICE' header, contact information for 'Nasa Customer Service' (+15037081210, 272 Elan view Lane, San Jose, CA 95035), a dropdown for 'United States', and a URL 'https://change2.com'. A green button 'Pay \$483.00' is also present. At the bottom right, a summary table shows 'Subtotal 483.00', 'Add discount' (disabled), and 'Amount Due (USD) \$483.00'. A modal titled 'Charge a Card' is open in the center. It contains a form with 'Amount to be paid' set to '\$ 483.00', radio buttons for 'Saved cards' and 'New card' (selected), 'Card Number' (1234 1234 1234 1234), 'Expiry Date' (MM / YY), and 'CVC' (CVC). At the bottom of the modal are 'Cancel' and 'Confirm & Charge' buttons.

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.

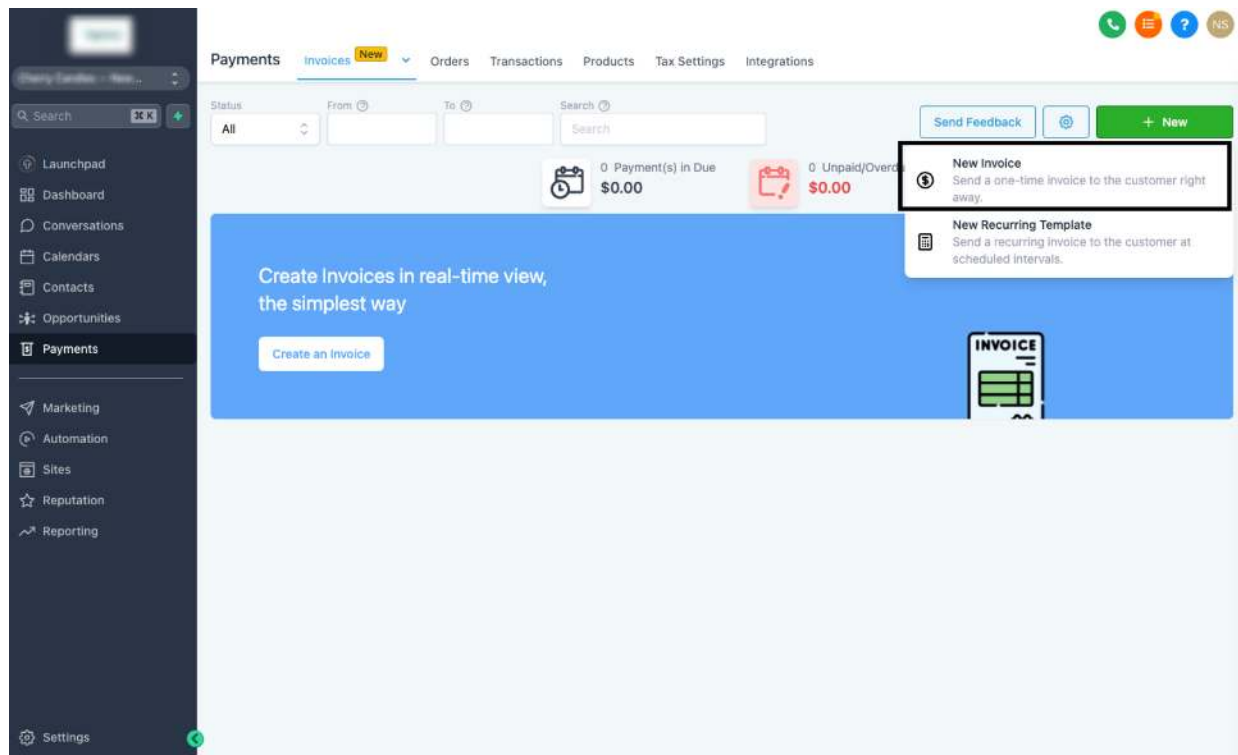
Please Note:

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

Common uses cases for Payments and Invoices

Back

New Invoice

⋮

Save

Send

✓

stripe


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

👁 Preview

Get a preview of the invoice

📄 Record Payment

Record payment for this 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
Price includes the price of one stick only.			
Texas State Use Tax: 6.5%			
EU VAT: 12.5%			

Step 5: Choose "Record Manually"

Back

New Invoice

⋮

Save


Send

✓

stripe

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

Resolve Now



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
Price includes the price of one stick only.			
Texas State Use Tax: 6.5%			
EU VAT: 12.5%			

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

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

The screenshot shows the Stripe 'New Invoice' interface. At the top, there's a 'Back' button and a 'New Invoice' title. On the right, there are 'Save' and 'Send' buttons. A Stripe Connect error message is visible at the top. The main area is titled 'INVOICE' and features the NASA logo. A 'Record Manually' modal is open, displaying a 'Mode of payment' dropdown menu with options: 'Select' (checked), 'Cash', 'Card', 'Cheque', 'Bank Transfer', and 'Other'. The background shows invoice details: 'Billed to' (Nasa Inv Testing, United States), 'Invoice ID' (inv_0000005157), 'Due Date' (September 6, 2022), and a 'Pay \$22,610.00' button. A table at the bottom lists items: 'GT Sticks' with a price of \$1000 and quantity of 20, totaling \$20,000.00. It also includes tax information for Texas and EU VAT.

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

Please Note:

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

Common uses cases for Payments and Invoices

The screenshot shows the Stripe 'New Invoice' page. At the top, there's a 'Back' button and a 'New Invoice' title. On the right, there are 'Save' and 'Send' buttons. A Stripe Connect error message is displayed at the top: 'Stripe Connect is not available and payments are failing. Resolve the problem immediately!' with a 'Resolve Now' button. The main content area is divided into three sections: 'Billed to' (with a NASA logo), 'Invoice' details, and a table of items. A 'Record Manually' modal is open in the center, allowing manual entry of payment details.

Record Manually

Mode of payment
Cash

Amount paid
\$ 22,610.00

Notes (Optional)
0/2000

Cancel Submit

INVOICE

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

Pay \$22,610.00

ITEM NAME	PRICE	QTY	SUBTOTAL
GT Sticks Price includes the price of one stick only.	\$ 1000	20	\$20,000.00
		Texas State Use Tax: 6.5%	
		EU VAT: 12.5%	

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"


Common uses cases for Payments and Invoices

Back

New Invoice

Save

Send



Nasa Customer Service

+15037081210

272 Elan view Lane

San Jose , CA

95035

United States

https://change2.com

Billed to

+ Add a client

Invoice No

inv_0000006075

Issue Date

March 9, 2023

Due Date

March 23, 2023

Pay \$0.00

ITEM NAME	PRICE	QTY	SUBTOTAL
<div>+ Add an item</div>			

Subtotal

0.00

+ Add discount

Amount Due (USD)

\$0.00

Add Notes / Terms

These are my default terms test

Step 2

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

Common uses cases for Payments and Invoices

The screenshot displays the 'New Invoice' interface. At the top, there's a header with a 'Back' button, the title 'New Invoice', and 'Save' and 'Send' buttons. The main content area is titled 'INVOICE'. On the left, there's a 'Billed to' section with a '+ Add a client' button. In the center, a modal window titled '+ New Item' is open, featuring 'Select a product' and 'Select a price' dropdown menus, and 'Cancel' and 'Save' buttons. The right side of the interface shows the NASA logo, contact information for 'Nasa Customer Service', a 'Pay \$0.00' button, and a summary section with 'Subtotal 0.00', 'Add discount', and 'Amount Due (USD) \$0.00'. At the bottom left, there's an 'Add Notes / Terms' section with the text 'These are my default terms test'.

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

Common uses cases for Payments and Invoices

The screenshot shows a 'New Invoice' interface. At the top, there's a 'Back' button and a 'New Invoice' title. On the right, there are 'Save' and 'Send' buttons. The main area is divided into sections: 'Billed to' (with a '+ Add a client' button), 'ITEM NAME' (with a table), 'Add Notes / Terms' (with a text area), and 'INVOICE' details (including a NASA logo, contact info, and a 'Pay \$0.00' button). A modal titled 'Add New Item' is open in the center. It has two sections: 'Product Information' and 'Pricing'. In the 'Product Information' section, 'Product name' is 'My ad-hoc product or service' and 'Product type' is 'Digital goods'. In the 'Pricing' section, 'Price name' is '\$50 for one unit' and 'Amount in (USD)' is '50'. A red circle highlights the 'Save for later use' checkbox. At the bottom of the modal are 'Cancel' and 'Add new item' buttons.

Back New Invoice Save Send

INVOICE

Nasa Customer Service
+19027081210
272 Elan view Lane
San Jose, CA
95035
United States
https://change2.com

Pay \$0.00

Billed to
+ Add a client

ITEM NAME

Add New Item

Product Information

Product name
My ad-hoc product or service

Product type
Digital goods

Pricing

Price name
\$50 for one unit

Amount in (USD)
50

☐ Save for later use

Cancel Add new item

Add Notes / Terms
These are my default terms text

SUBTOTAL
0.00
\$0.00

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


Common uses cases for Payments and Invoices

Back

New Invoice

Save

Send



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95035
United States
https://change2.com

Billed to

+ Add a client

Invoice No

inv_0000006075

Issue Date

March 9, 2023

Due Date

March 23, 2023

Pay \$50.00

ITEM NAME	PRICE	QTY	SUBTOTAL
\$50 for one unit Give item description here	\$ 50 Add Tax	1	\$50.00
+ Add an item			
Subtotal			50.00
Add discount			
Amount Due (USD)			\$50.00

Add Notes / Terms

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"

Common uses cases for Payments and Invoices

The screenshot displays the 'Tax Settings' page, which allows users to manage tax settings for invoices. The page features a sidebar with navigation options like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Payments, Marketing, Automation, Sites, Reputation, and Reporting. The main content area shows a table of tax settings. The 'Card Processing Surcharge' row is highlighted with a red rectangle. The table includes columns for Name, Rate, Description, Tax ID Number, and Created At. A '+ Add Tax' button is located in the top right corner of the table area.

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"


Common uses cases for Payments and Invoices

Back

New Invoice

Save

Send



Nasa Customer Service
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San Jose , CA
95035
United States
<https://change2.com>

Billed to

Invoice No

Issue Date

Due Date

Pay \$650.00

+ Add a client

inv_0000006075

March 10, 2023

March 24, 2023

ITEM NAME	PRICE	QTY	SUBTOTAL
Cricket Coaching Lessons Part 1	\$ 650 Add Tax	1	\$650.00
+ Add an item			

Subtotal

Add discount

Amount Due (USD)

\$650.00

Add Notes / Terms

These are my default terms test

Back

New Invoice

Save

Send



Nasa Customer Service
+15037081219
272 Ellen view Lane
San Jose , CA
95035
United States
<https://change2.com>

Billed to

Invoice No

Issue Date

Due Date

Pay \$650.00

+ Add a client

inv_0000006075

March 10, 2023

March 24, 2023

ITEM NAME	PRICE	QTY	SUBTOTAL
Cricket Coaching Lessons Part 1	\$ 650 Add Tax	1	\$650.00
+ Add an item			

Subtotal

Add discount

Amount Due (USD)

\$650.00

Add Notes / Terms

These are my default terms test

Add Taxes

NAME OF TAX	TAX RATES (%)	TAX ID NUMBER
<input checked="" type="checkbox"/> Card Processing	3	-
<input type="checkbox"/> Quebec GST	10	GST0001
<input type="checkbox"/> UK VAT	20	-
<input type="checkbox"/> Texas State Use	6.5	-

Cancel

Save

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


Common uses cases for Payments and Invoices

Back

New Invoice

Save

Send



Nasa Customer Service

+15037081219

272 Elen view Lane

San Jose , CA

95035

United States

https://change2.com

Billed to

+ Add a client

Invoice No

inv_0000006075

Issue Date

March 10, 2023

Due Date

March 24, 2023

Pay \$669.50

ITEM NAME	PRICE	QTY	SUBTOTAL
Cricket Coaching Lessons Part 1	\$ 650	1	\$650.00
Card Processing Surcharge: 3%			
Add Tax			
+ Add an item			

Subtotal

650.00

Add discount

Card Processing Surcharge

19.50


Amount Due (USD)

\$669.50

Add Notes / Terms

These are my default terms test

Here is what the payer would see in the invoice



Nasa Customer Service

(503) 708-1219

272 Elen view Lane

San Jose, CA 95035

United States

https://change2.com

Billed to

Valdez and McCoy Co

Ivana Kelly 2

070668 06272

nasav1212@goghivlel.com

Adipiscing ea harum

Qui dicta enim et te, Paratur Possimus

52259

Saint Kitts and Nevis

Invoice No

inv_0000006075

Issue Date

March 10, 2023

Due Date

March 24, 2023

Terms & Notes:

These are my default terms test

[Click here to download pdf](#)