Payments

On the payments home page, you can add residents by clicking the plus on the top right. Here you have the option to add bulk with email or email and phone already on file for the residents.They will receive invoiced through email, and text if you choose to include their phone number. You can also click on a resident if you were to add them one at a time, and use an email and phone number of someone who is paying on behalf of this resident. You can invoice incoming or current residents. In rare cases you can manually add a customers who is neither a resident or a third party paying for a specific resident. To add a resident's phone number so they can receive text invoices after the invoice is created, go into their profile in payments, and edit the details section to add their phone number.

Once added, you will see each resident appear on the home page with their name, profile photo, their subscription static, and current balance. Once you click view for a specific resident, you will see their balance, recurring invoices, details (resident, billing name, billing email, and billing phone). Note that billing info is not always the same as resident info if someone else pays their bills. At the bottom is the list of invoices and digital payments.

To create a one time invoice, click the plus on the top right of the invoices section. You can add the details here, select and payment method, and due date. You can also choose to apply processing fees to the resident, or uncheck the box which will apply the fees to you. We recommend using one time invoices for move in fees, or past payments that you need to keep record of. However, for recurring payments, we suggest using our recurring invoices feature.

Just above the details section you can create a recurring invoice for a resident. Here you can select the period payment method, etc. This invoice functions essentially as a subscription, so when the resident pays for the first time they opt-in to the subscription. You have the option to apply processing fees to the resident, and enable autopay. Once an invoice has been sent, you can see it listed under the invoices section. If you would like to mark it as paid, void, or partially paid, click the invoice, navigate to the three dots on the top right, and click mark as paid, void, or record credit and apply the exact amount of credit. Here you can also download a pdf of the invoice. You have the option to export invoices and digital payments by clicking the export button on the top right of the respective section.

By clicking the three dots to the right of the resident's name, you have the option to edit the customer, create an invoice, edit subscription, cancel subscription, or delete the customer. You can also access the payment portal here. The payment portal is what the customer sees when they are making payments. They can see their invoices, make a payment, and see their balance. They can make payments at any time. This is helpful for residents who prefer to pay upfront. They can pay the upfront amount through the portal, and then that can be applied as credit to recurring invoices in the future. This is one of two ways residents can pay. They can also pay through an invoice link sent to their email and phone (if they chose to include their phone number). In the payments home page, you also have the option to export large amounts of payment data. Click on the top right export button. Here you can export invoices or payments and select the date range, columns and filter.

To see all of your payouts if you are an admin, click on your profile on the top right of the screen, and then click manage organization, and then navigate to the payouts tab where you can see all payouts earned. Remember, all available fund will be paid our on friday and received in your bank account on sunday.

NOTE: you cannot edit an invoice once it has been sent, but you can edit recurring invoices using the edit icon on the top right of the recurring invoices section in resident profiles in payments. This will make edits for the next, unsent invoice

Topic: Adding Residents to Payments
Q: How do I add residents on the Payments home page?
A: On the payments home page, you can add residents by clicking the plus on the top right.

Q: What are the options when adding residents in bulk?
A: You have the option to add bulk with email or email and phone already on file for the residents.

Q: How will residents receive invoices when added in bulk?
A: They will receive invoices through email, and text if you choose to include their phone number.

Q: How do I add someone who is paying on behalf of a resident?
A: You can click on a resident if you were to add them one at a time, and use an email and phone number of someone who is paying on behalf of this resident

Q: what is manual add used for?
A: Manual add is used in rare cases to add someone who is not a resident or paying on behalf of a resident.

Q: Can I invoice both incoming and current residents?
A: You can invoice incoming or current residents.

Q: Can I add a customer who is not a resident or third-party payer?
A: In rare cases you can manually add a customer who is neither a resident or a third party paying for a specific resident.

Q: How do I add a resident’s phone number so they receive text invoices?
A: To add a resident’s phone number so they can receive text invoices after the invoice is created, go into their profile in payments, and edit the details section to add their phone number.

Topic: Resident Dashboard View
Q: What do I see after adding a resident?

A: Once added, you will see each resident appear on the home page with their name, profile photo, their subscription static, and current balance.

Q: What information is visible when I view a resident?
A: Once you click view for a specific resident, you will see their balance, recurring invoices, details (resident, billing name, billing email, and billing phone). Note that billing info is not always the same as resident info if someone else pays their bills. At the bottom is the list of invoices and digital payments.

Topic: Creating Invoices
Q: How do I create a one-time invoice?
A: To create a one time invoice, click the plus on the top right of the invoices section. You can add the details here, select and payment method, and due date. You can also choose to apply processing fees to the resident, or uncheck the box which will apply the fees to you.

Q: When should I use a one-time invoice?
A: We recommend using one time invoices for move in fees, or past payments that you need to keep record of.

Q: When should I use recurring invoices instead?
A: For recurring payments, we suggest using our recurring invoices feature.

Topic: Recurring Invoices
Q: How do I create a recurring invoice?
A: Just above the details section you can create a recurring invoice for a resident. Here you can select the period payment method, etc.

Q: How does a recurring invoice work?
A: This invoice functions essentially as a subscription, so when the resident pays for the first time they opt-in to the subscription.

Q: Can I apply processing fees to recurring invoices?
A: You have the option to apply processing fees to the resident, and enable autopay.

Topic: Invoice Management
Q: Where can I see sent invoices?
A: Once an invoice has been sent, you can see it listed under the invoices section.

Q: How do I mark an invoice as paid, void, or partially paid?
A: Click the invoice, navigate to the three dots on the top right, and click mark as paid, void, or record credit and apply the exact amount of credit.

Q: Can I download a copy of the invoice?
A: Yes, you can also download a PDF of the invoice.

Topic: Invoice Exporting
Q: How do I export invoices or payments?
A: Click the export button on the top right of the respective section.

Q: What can I customize when exporting?
A: You can select the date range, columns, and filter.

Topic: Resident Options & Portal Access
Q: What can I do from the resident's dropdown menu?
A: Click the three dots to the right of the resident's name to edit the customer, create an invoice, edit subscription, cancel subscription, or delete the customer.

Q: What is the payment portal?
A: The payment portal is what the customer sees when they are making payments. They can see their invoices, make a payment, and see their balance.

Q: When can residents make payments through the portal?
A: They can make payments at any time.

Q: Can residents prepay through the portal?
A: Yes. Residents who prefer to pay upfront can pay the upfront amount through the portal, and that can be applied as credit to recurring invoices in the future.

Q: What are the two ways residents can pay?
A: Residents can pay through the portal or through an invoice link sent to their email and phone (if they included their phone number).

Topic: Payouts and Admin Dashboard
Q: How do I see payouts if I am an admin?
A: Click on your profile on the top right of the screen, then click “Manage Organization,” and navigate to the “Payouts” tab.

Q: When will I receive payouts?
A: All available funds will be paid out on Friday and received in your bank account on Sunday.

Payments FAQ

Payments Usage Best Practices for Self Pay Clients:

Step 1 (optional):

Send them a payment form like this one below ON INTAKE. (I can write this for you). This is optional, you could just ask them. This stores the necessary information about how they want to pay.

The form has 3 questions.

Q1: Is a treatment center / 3 rd party covering the beginning of your stay?

- Yes
- No

Q2: Do you have a bank account

- Yes
- No

Q3: How would you like to pay (you must choose Credit Card if you don't have a bank account)

- Credit Card / CashApp, Fee= 3.9% + 30 cents
- ACH fee= 1.2%

I agree to automatic payments on the first of every month for the standard A Way Out Sober Living Price.

Client Signature*

Step 2

If the treatment center is paying for them, don’t do anything in sobriety hub until the treatment center stops paying for them.

Once the treatment center stops paying for them, go to payments in Sobriety Hub,

1. Go to residents.
2. View the payment form submitted by the resident [from Step 1]. There you will see if they want ACH or Credit Card / Cash App
3. Go to payments.
4. Add Resident contact info from the right side
5. Create a recurring invoice for the resident
6. Select “apply fees to resident”
7. Select “autopay”.
8. Choose ACH or Credit based on what you find in part (2)

They will get an invoice on the “next invoice date” it will be due X number of days after based on what you choose in the “days until due” section on the “create recurring invoice” modal.

Review it and make sure it looks right and activate recurring invoicing.

If you've reached this step, now you do not have to do anything payment related for this client ever again.

After they put in CC or Bank info on the first one, they will be auto charged. It will automatically stop when you discharge them.

You never have to send another invoice to this client again. You never have to send them a one-time invoice. You never have to modify their recurring invoice. You do this upfront, and you are DONE.

Basic Questions

Q: How does the payment system work?
A: Sobriety Hub allows administrators to generate invoices, send them to residents or third-party payers via email or text, and track payments.

Q: Can we invoice out of Sobriety Hub?
A: Yes, we have a full invoicing system, with recurring invoicing, one time invoices, autopay, digital and cash payment options, and automated receipts.

Q: How do I send invoices for residents to pay?
A: Go to the Payments tab, find the resident and add their contact information. Generally, every resident should be sent a one time invoice for their move-in fee and they should all have recurring invoices (subscriptions) for their ongoing housing or program fees. This will automatically notify the resident as invoices are created and track their balance as time passes.

Q: How do I send a one-time move-in fee invoice to a new resident?
A: Yes, click "Send one time" when creating the resident's invoice and enter the amount for their move-in fee.

Q: How do I set up recurring weekly or monthly rent invoices for a resident?
A: In the resident's payment profile, click "Create Recurring", select weekly or monthly, enter the amount, start date, and days until due.

Q: How does AutoPay work?
A: AutoPay activates after a resident makes their first recurring payment. Future payments will be automatically charged unless canceled.

Q: What happens when a resident makes their first recurring payment? Do they have to opt-in?
A: After a resident makes their first recurring payment on a subscription, future payments will be automatically charged on the invoice creation date (not the due date) if autopay is enabled. The resident essentially opts-in to autopay by making their first payment.

Q: How do I track resident payments?
A: The platform includes a ledger that records all incoming payments, by resident, by house or any other relevant attribute.

Q: How does invoicing impact resident balances?
A: When invoices are created, balances go up. When payments are made balances go down. Residents are sorted on the main payments page by most overdue.

Q: What happens if a resident fails to make a payment?
A: The system flags overdue payments and notifies administrators. Recurring invoices remain active until manually adjusted or canceled.

Q: When clients pay a bill through Sobriety Hub, where does that show up?
A: It shows up in Sobriety Hub on the payment page for the resident that paid. You can also export all payments and set a date range (e.g. last week) to see all payments that came through during a specific period of time. The payments accumulate throughout the week and pay out to your bank account weekly! You can view the payout status by clicking in the top right corner and clicking “manage organization”. Here you can see funds that are not yet distributed to your connected account.

Q: Can I track expenses or other accounting information?
A: While Sobriety Hub currently tracks resident payments, additional tracking features for expenses per resident may be implemented based on demand. Sobriety Hub is a revenue collection tool, not an accounting software.

Q: Can notes be added to invoices for residents to see?
A: Yes. Residents can see the description entered on the invoice, which is the one piece of information that can be passed along to them.

Q: Payment Portal Features:
A: Pay full amount, overpay, underpay, choose payment method, direct invoice payments only allow paying full amount with pre-selected payment method

Q: Can residents choose between ACH and credit card payments?
A: Invoices that are created by staff / admins specify a single payment method due to processing fee differences on the amount totals.However, if a resident pays through their payment portal, which they can access using the email address matching their customer in sobriety hub, they can submit a payment of any amount and select their own payment method.

Q: How can I bill someone other than the resident (e.g., a family member or third party)?
A: Administrators can modify invoice recipient details before sending, allowing payments to be processed by family members or other third parties.

Q: Can I add a credit card processing fee to invoices?
A: Yes, check "Apply processing fees to resident" when creating a one time invoice or starting a recurring invoice schedule. This will add the fee on top of the base amount.
Please NOTE: When creating invoices for clients who pay with cash, you should create invoices without including processing fees. Marking cash payments on non invoices including fees will result in incorrect payment amounts (because Cash has no fees).

Q: How do I handle cash payments in Sobriety Hub?
A: For residents who pay in cash:

1. Create invoices WITHOUT including processing fees
2. After receiving cash payment, click on the invoice
3. Click the three dots in top right
4. Select "Mark as Paid"
5. Enter "Cash" in the description

NOTE: You can't record a cash payment until AFTER an invoice is created. For recurring invoices, you can only schedule them to start in the future, so to mark previous invoices as paid, create one time invoices, mark them as paid, and then set the recurring invoicing schedule to begin tracking the go-forward balance.

Q: Can fees be removed for cash payments?
A: No. Stripe isn't set up for this scenario, as it assumes all payments go through their system. It's a minor inconvenience when residents pay cash for invoices that include processing fees.

NOTE: When creating invoices for clients who pay with cash, you should create invoices without including processing fees. Marking cash payments on non invoices including fees will result in incorrect payment amounts (because Cash has no fees).

Q: How often do payouts occur from Sobriety Hub to our bank account?
A: By default, payouts occur weekly, but this can be changed to daily if you contact Sobriety Hub support.

Q: When do invoices get sent out to residents?
A: One Time invoices invoices will be created and sent INSTANTLY. You can specify the due date. They will be sent via SMS and email to the contact information for the customer. Recurring invoices will be created and sent on the “first invoice” or “next invoice” date as seen on the edit or review tabs of the recurring invoice schedule. The due date will be the number of “days until due” AFTER the “first invoice” or “next invoice” date field.

Q: When will I get paid?
A: Payouts accumulate through the week and are transferred on Friday (default weekly payout schedule). Funds take 2-3 days to transfer to your bank account after initiation. So you can expect payouts from Sobriety Hub to your bank account on Monday.
The accumulation of funds happens:
INSTANTLY for Credit cards, cash app, apple pay, *recurring* ACH, and debit cards
3-5 DAYS for *Initial* ACH payments take 3-5 days for the initial payments and may require bank account confirmation. Once a payment method is established for a recurring invoice, it will no longer take 3-5 days as long as the recurring invoices schedule and settings remain the same.

Q: Do I have to use Stripe for payments?
A: Yes, everything regarding payments including invoicing features all are through Stripe. Please note that you can utilize our payments feature without processing payments electronically. You can still record cash payments, or payments made outside of Stripe. But setting up Stripe is required to access any of the automated invoicing, balance tracking, and invoice notifications features which are all embedded in our payments.

Advanced Questions

Q: Can I integrate invoicing software like Zoho or QuickBooks with the transaction/rent logs? Are APIs available for Zapier connections?
A: While we don't currently offer direct integration with Zoho or QuickBooks, we have a comprehensive internal payment and transaction tracking system. We're exploring API connections for future updates, but they're not available at this time.

Q: When setting up recurring invoices, if I check the autopay box, does that mean it gives the resident the option to setup auto pay, or does it mean that they are required to set it up?
A: If you check the autopay box on a recurring invoice it will enroll the client in autopay and not give them the option. By submitting the first recurring invoice payment, they are agreeing to the subscription / recurring invoice schedule and therefore will be charged again when the next invoice(s) are created.I would suggest using autopay and just making sure that clients are aware of that on intake. If that is untenable, then you can not use autopay, but you will probably have to hunt down more payments.

Q: I have my view showing residents paid the amount exactly, but as it is but now the residents are getting credit notices showing what they paid plus a fee they did not pay. Nobody uses stripe so we don't need the fees to show at all. Is there an option where that fee is not showing up for me or them?
A: Those fees are always going to show up on an expanded view of the invoice. But if you aren't passing on the fees and they aren't paying online, you can just tell them to ignore that part of the invoice because it doesn't apply to them.

Q: How do I record a payment if someone pays ahead and the invoice was never created?
A: Add them as a customer, have them go onto the portal (sobrietyhub.app/client/portal). On the portal, she can make a payment of any amount at any time, regardless of if invoices are created. All payments in excess of create invoices will accrue and automatically apply to new invoices that are created or manually generated via a recurring invoice.
If they are paying cash and want to make a pre-payment, then you should create the invoice first (even if it's ahead of time) and then mark it as paid or record a payment. This helps maintain accurate payment records. Now, if they have a recurring invoice schedule, I would modify either the start date or the amount or both depending on if she already paid for the first week. For example, if they paid for the first week, I would move the recurring invoice start back to week 2.

Q: Someone makes partial payment, so when the invoice comes out, would I be able to mark it "paid" because there would still be a balance due?
A: For partial payments, you can record the partial payment by clicking the three dots next to the invoice and selecting "Record a Payment." This will allow you to enter the exact amount received and maintain a record of the remaining balance.

Q: What if one third party organization or grant or outside funding source is paying on behalf of multiple residents?
A: You have 2 options. The first option is to make the billing email for the residents who are related to the grant / 3rd party organization go to the grant / 3rd party organization. You can do this when you add a customer to payments. If you have already added them, you can edit the billing contact information for the resident by viewing their account on the payment page. The billing contact info is in the top right corner and the edit button is in the top right corner. Then, instruct the 3rd party or outside funding source to go to the payment portal and enter their email address. When they enter their email address they will get a 2 factor code and upon logging in they will see ALL of the residents who they are paying for. They can go into each resident and

view the invoices associated with that specific resident, make payments on behalf of that resident, etc.
The second option is to add a customer to payments that is not associated with a resident. Click “manually add customer”. This allows you to bill someone who is not connected to any resident.

Q: How can I access the payment portal?
A: Go to sobrietyhub.app/client/portal and enter your email address or phone number. If the email or phone number matches the billing email or phone number associated with a customer in your organization, then they will get a 2 factor code to log in and view their invoices. Please note that the billing email and phone number can be different from the resident phone number and email.

Q: What is billing contact info vs resident contact info?
A: To check the billing contact information for a resident, go to the payments section and view the customer page. The billing contact info is in the top right corner. It can be different than the resident contact info to allow you to bill non-resident parties (eg. 3rd party funding sources) paying on behalf of residents.

Q: Should sober living homes collect credit card information or store credit card information from residents?
A: No, collecting or storing credit card information is not recommended as it's risky. Instead, house managers should send invoices to residents and have them pay directly.

Q: Changing how fees are displayed

A: You Can show balances with or without fees included (setting in Manage Account > Settings)

Q: How do I un-enroll someone from Sobriety Hub payments when they leave the house?
A: Discharging a resident will automatically cancel any pending invoices and recurring payments for that resident in Sobriety Hub.

Q: How are portal payments applied to invoices?
A: Payments are applied automatically to invoices in order from oldest to newest. The system will pay invoices in full starting with the oldest one. If there's not enough credit to fully pay the next invoice in line, that invoice remains unpaid until more credit is available.

Q: How can users see which invoices have been paid by a payment?
A: When viewing the details of a specific payment, our system shows:

- Which invoices were covered by the payment
- The amount applied to each invoice from the payment

- Any remaining credit surplus from that payment

Q: How does the system handle partial payments?
A: Partial payments are accumulated as credits until there's enough to cover an invoice in full. Once there's enough credit to fully cover the oldest outstanding invoice, that invoice gets automatically marked as paid.
Leftover credit (surplus), accumulates and gets applied to invoices automatically once the accumulated surplus amount exceeds the amount on the oldest open invoice.

Q: How are different payment statuses displayed?
A: a few markers indicate payment statuses:

- Green: Fully applied payment with no remaining surplus
- Blue: Payment with some amount remaining as credit
- Red: the red/orange warning icon indicates that a payment succeeded in stripe, but we did not record it in the database, which means it is unable to be processed/applied to invoices. the solution is to click on the payment and click 'retry' which will force it to be recorded in the database.

Q: How does the system handle over-payments?
A: If a payment exceeds the amount needed for an invoice, the system will:

- Apply part of the payment to fully cover that invoice
- Apply the remaining amount to the next oldest invoice if possible
- Keep any leftover amount as a credit surplus for future invoices
  For example, If the client has a total balance of $50 and submits a payment of $100, then the $50 invoice will get marked as paid. If another invoice is created for less than $50, it will also be marked as paid automatically from the $50 leftover credit (surplus).
  Note that if the client overpays by $50 in the above example, and then you create an invoice for $300, the invoice won't be marked as paid because the leftover credit (surplus) does not exceed the invoice total on the oldest open invoice.

Q: Can users manually apply electronic payments to specific invoices?
A: Yes. While the system automatically applies payments to the oldest invoices first, users can manually apply any credit surplus to newer invoices. This is only relevant when you want to pay a newer invoice while an older, larger invoice remains unpaid.

Q: Is there a way to track expenses per resident, as required by our state licensing organization?
A: While there is no expense tracking feature, a workaround is to record any expenses for a resident (e.g. prescription copay) as line item on their next rent invoice so they reimburse you and it's documented.

Q: Will the portal remain active even after a resident is discharged?
A: Yes, the portal will remain active even after the resident is discharged

Q: How do I change an invoice from accepting bank account to a credit card?
A: The invoice is created with either option selected and invoices cannot be modified after they are generated and sent to the client.

If they client wants to pay with a credit card, they can do so on the portal (sobrietyhub.app/client/portal) and if they choose credit card it will automatically add the fees to whatever they want to pay.

The portal also allows for over and underpayments while paying directly on the invoice does not.

Portal payments get applied to invoices once the sum of portal payments exceeds the balance on open invoices

Q: If a payment comes in, can the user apply it to an invoice if the payment only partially covers the invoice?

A: No, it must be full.

In order to avoid computing what a partial payment looks like with regards to fees, it must be full, since the resident already paid fees on that payment.