

# Unapply a Payment

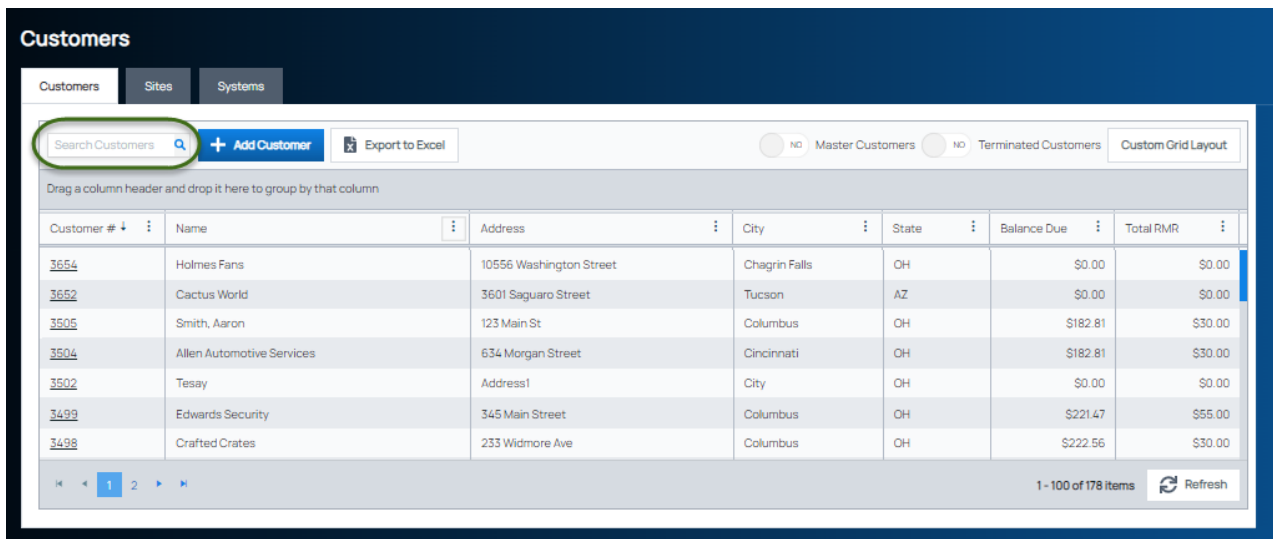
Last Modified on 12/20/2024 1:45 pm EST

If a payment was applied to the incorrect invoice, you may unapply the payment application.

To unapply a payment application, you must access the customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers opens. Locate the customer in the list, and then click the hyperlink in the Customer # column to open the customer record.



The screenshot displays the 'Customers' list interface. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs, there is a search bar labeled 'Search Customers' with a magnifying glass icon, a '+ Add Customer' button, and an 'Export to Excel' button. To the right of these buttons are two toggle switches for 'Master Customers' and 'Terminated Customers', both currently set to 'NO', and a 'Custom Grid Layout' button. Below the search and action buttons, there is a instruction: 'Drag a column header and drop it here to group by that column'. The main area is a table with the following columns: 'Customer #', 'Name', 'Address', 'City', 'State', 'Balance Due', and 'Total RMR'. The table contains seven rows of customer data. At the bottom of the table, there is a pagination control showing '1' of two pages and a 'Refresh' button. The status bar at the bottom right indicates '1 - 100 of 178 items'.

Customer #	Name	Address	City	State	Balance Due	Total RMR
<a href="#">3654</a>	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3652</a>	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
<a href="#">3505</a>	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
<a href="#">3504</a>	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
<a href="#">3502</a>	Tesay	Address1	City	OH	\$0.00	\$0.00
<a href="#">3499</a>	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
<a href="#">3498</a>	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

The Customer record opens. Click the Invoices tab, and then click the toggle button to "Show All Invoices". A list of all invoices for the customer is shown in the grid area. In the Invoice # column, click the hyperlink of the desired invoice.

**Emily Wood**  
Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Total Balance Due Total RMR  
**\$0.00** **\$0.00**

Customer Aging

Address 45722 Chandler  
Plymouth, MI 48170  
Phone (734) 258-4646  
Cell (734) 258-3311  
Email emilylwood@gmail.com

Salesperson Dan Brown  
Last Statement  
Default Term  
Delivery Method Print  
Delivery RMR Inv

Comments

Invoices 0 Credits 0 Sites/Systems 1/0 RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 0 Documents Archive Custom Fields eForms Emails

[+ New Invoice](#) [Generate Statement](#)  Show all invoices

Invoice #	Invoice Date	Due Date	PO Number	Total Amount	Amount Due	
21461	Mar 25, 2022	Mar 25, 2022		\$125.00	\$0.00	\$ Pay Invoice
21462	Mar 25, 2022	Mar 25, 2022		\$33.00	\$0.00	\$ Pay Invoice
21463	Mar 25, 2022	Mar 25, 2022		\$250.00	\$20.80	\$ Pay Invoice
21467	Mar 25, 2022	Mar 25, 2022		\$33.05	\$33.05	\$ Pay Invoice

1 - 1 of 1 items Refresh

The invoice opens. Click the Payments tab, and then click the **Unapply Payment** button. The payment is removed from the invoice and available to apply to a different invoice. Make note of the payment number that was unapplied. This will appear on the Customer Payments tab.

**Manual Invoice 21461** [\\$ Make a Payment](#) [Deliver](#) [Tasks](#) [History](#) [More...](#)

Emily Wood #3719-01 Emily Wood - 45722 Chandler

Invoice Amount **\$125.00** Balance Due **\$0.00**  
 • 1 Payment = \$125.00 • 1 day past due  
 • 0 Credits = \$0.00

Category 400 SVC Sales Tax MI - 6.0000%  
 PO Number - Term Due on Receipt  
 Work Order - Salesperson Kathy Ackerman  
 Invoice Date March 25, 2022 Delivery Method Print  
 Due Date March 25, 2022 Originally Delivered -  
 Contact - Sales Package None  
 Billing Address 45722 Chandler

Items 1 Parts 0 Memo Payments 1 Credits 0 Tax Emails General Ledger Part Ledger

[Export to Excel](#)

Applied Date ↓	Amount Applied	Payment	
Mar 25, 2022, 10:55:57 AM	\$125.00	1137	<a href="#">Unapply Payment</a>

1 - 1 of 1 items Refresh