

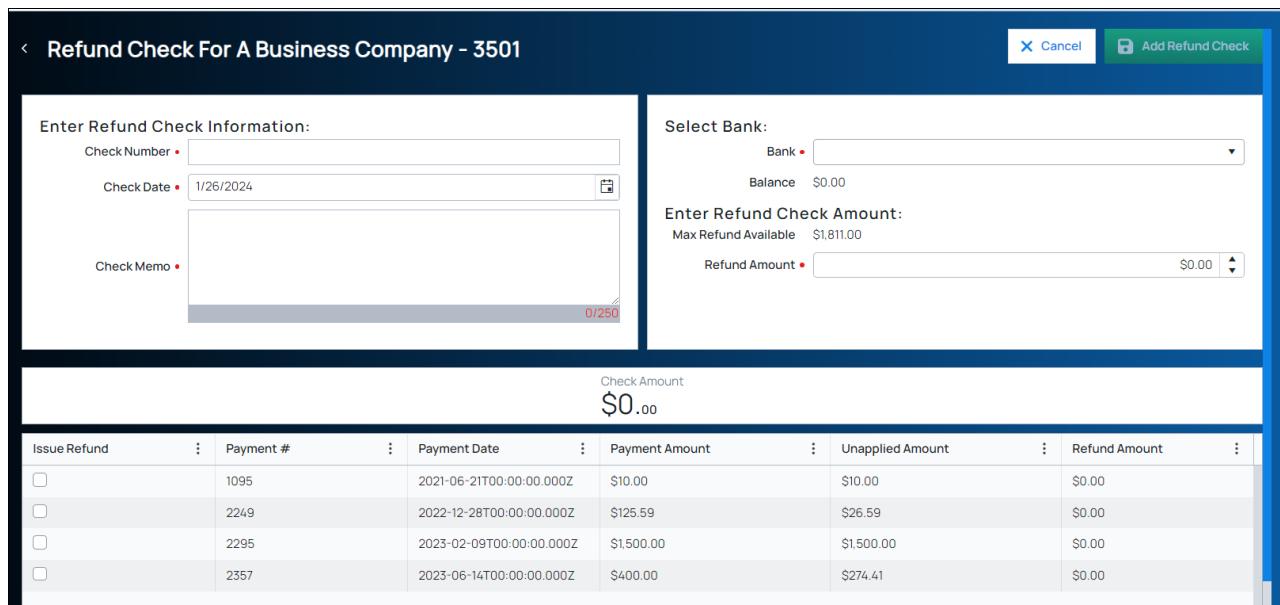
Payments Tab

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The Payments tab displays all payments received from the customer.

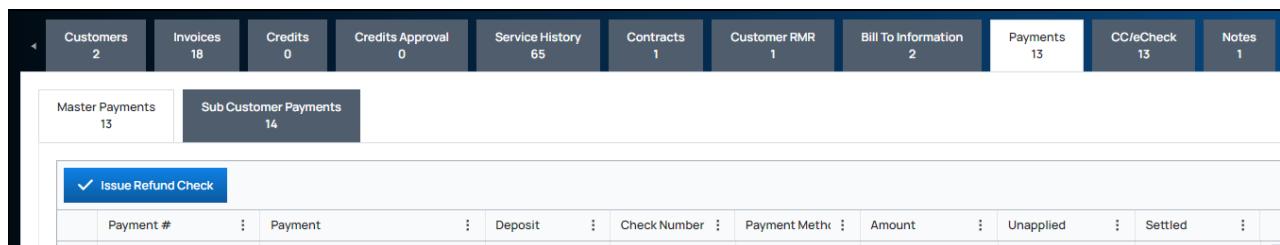
Issue Refund Check Button

This button opens the Refund Screen where you can fill out the information for a refund check. Optionally, select the checkbox next to one or multiple payment records listed at the bottom of the screen to automatically calculate the amount of the refund check.



Issue Refund	Payment #	Payment Date	Payment Amount	Unapplied Amount	Refund Amount
<input type="checkbox"/>	1095	2021-06-21T00:00:00.000Z	\$10.00	\$10.00	\$0.00
<input type="checkbox"/>	2249	2022-12-28T00:00:00.000Z	\$125.59	\$26.59	\$0.00
<input type="checkbox"/>	2295	2023-02-09T00:00:00.000Z	\$1,500.00	\$1,500.00	\$0.00
<input type="checkbox"/>	2357	2023-06-14T00:00:00.000Z	\$400.00	\$274.41	\$0.00

For a master customer on the Payments tab, the Master Payments sub tab also has the **Issue Refund Check** button.



Payment #	Payment	Deposit	Check Number	Payment Method	Amount	Unapplied	Settled
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Note: The Issue Refund Check button is hidden on the Sub Customer Payments tab.

Payment Hyperlink

In the Payment # column, clicking on the hyperlink of a Payment will open the payment record for viewing.

Receipt Button

Clicking the **Receipt** button opens a dialog box where you can enter an email address to email a receipt for the payment to the customer. There is an option on this dialog box to print the receipt. Selecting the print option creates a .pdf file of the customer receipt. You can open the file and send the document to a local printer.

Apply Button

If there is an unapplied amount for a payment, clicking the **Apply** button opens a list of the customer's invoices with a balance due. Selects which invoice(s) to apply the payment.

The screenshot shows the ServiceCore software interface for a customer named Emily Wood. The top navigation bar includes 'Edit', 'Tasks', and 'History' buttons. The customer profile shows a total balance due of \$822.71 and a total RMR of \$120.00. A 'Customer Aging' chart is displayed, with a legend indicating the following color-coding: Current (green), 1-30 Days (blue), 31-60 Days (orange), 61-90 Days (red), and 91+ (yellow). The chart shows a significant portion of the balance due is in the 1-30 Days category. Below the chart, there are sections for Address, Phone, Cell, Email, Salesperson, Last Statement, Default Term, Delivery Method, and Delivery RMR Inv. A 'Comments' section is also present. A navigation bar at the bottom lists various customer-related modules: Invoices (7), Credits (2), Sites/Systems (2/3), RMR (5), Work Orders (2), Proposals (0), Payments (8), CC/eCheck, Notes (0), Contacts (2), Documents, Archive, Custom Fields, eForms, and Emails. A modal window titled 'Issue Refund Check' is open, showing a list of 8 payment items. Each item has a 'Receipt' button and an 'Apply' button. The 'Apply' button is only visible for the last item in the list, which is payment number 1146. The modal also includes a navigation bar with page numbers 1-8 of 8 items and a 'Refresh' button.

Payment #	Payment	Deposit	Check Number	Payment Meth...	Amount	Unapplied	Settled	Receipt	Apply
1131	Mar 25, 2022	2159	3155	Check	\$450.00	\$0.00	<input type="radio"/> NO		
1132	Mar 25, 2022	2161	3155	Check	\$450.00	\$0.00	<input type="radio"/> NO		
1138	Mar 25, 2022	2161	3122	Check	\$79.50	\$0.00	<input type="radio"/> NO		
1143	Mar 25, 2022	2162	3155	Check	\$450.00	\$0.00	<input type="radio"/> NO		
1144	Mar 25, 2022	2162	65165	Check	\$1,100.00	\$0.00	<input type="radio"/> NO		
1145	Mar 25, 2022	2163	65365	Check	\$750.00	\$750.00	<input type="radio"/> NO		\$ Apply
1146	Mar 25, 2022	2164	0021	Check	\$100.00	\$0.00	<input type="radio"/> NO		