Payments Tab

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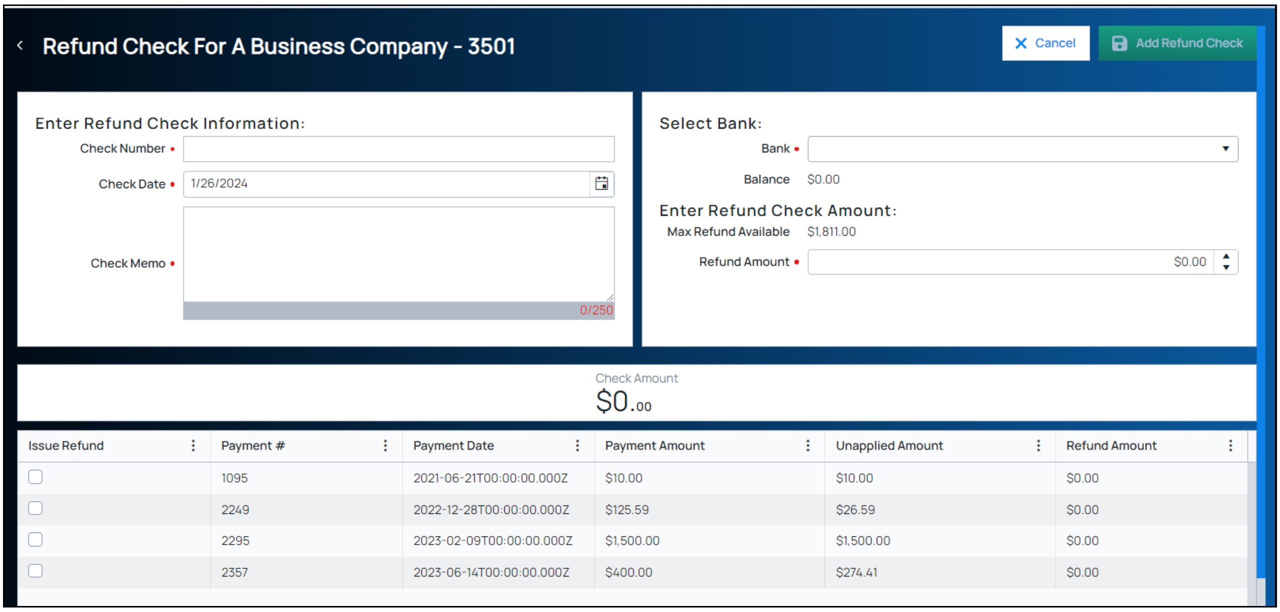
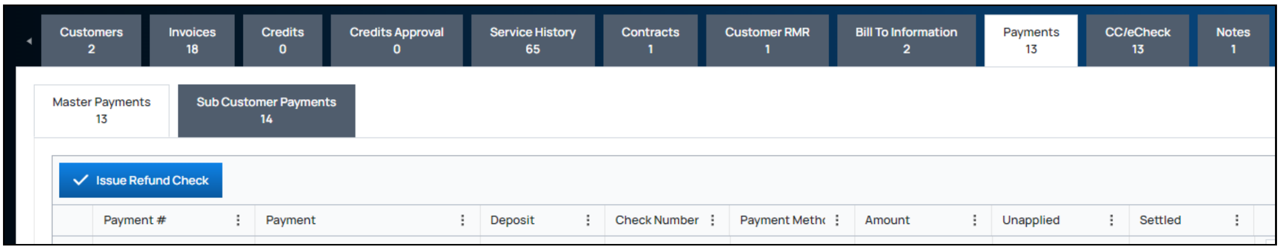
The Payments tab displays all payments received from the customer.

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.



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



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.