

Payments Tab

Last Modified on 01/08/2026 2:07 pm EST

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.

Refund Check For A Business Company - 3501

Cancel

Add Refund Check

Enter Refund Check Information:

Check Number

Check Date

1/26/2024

Check Memo

Select Bank:

Bank

Balance

\$0.00

Enter Refund Check Amount:

Max Refund Available

\$1,811.00

Refund Amount

\$0.00

Check Amount

\$0.00

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 theIssue Refund Check button.

Customers

Invoices

Credits

Credits Approval

Service History

Contracts

Customer RMR

Bill To Information

Payments

CC/eCheck

Notes

Master Payments

Sub Customer Payments

Issue Refund Check

Payment #	Payment	Deposit	Check Number	Payment Meth	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.

Emily Wood

Customer #3719

Active

Normal

Residential-Owner • Since 3/4/22

Edit

Tasks

History

Total Balance Due

\$ 822.71

Total RMR

\$ 120.00

Customer Aging

1800

1600

1400

1200

1000

800

600

400

200

0

Current

1-30 Days

31-60 Days

61-90 Days

91+

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

Invoices7

Credits2

Sites/Systems2/3

RMR5

Work Orders2

Proposals0

Payments8

CC/eCheck

Notes0

Contacts2

Documents

Archive

Custom Fields

eForms

Emails

Issue Refund Check

Payment #	Payment	Deposit	Check Number	Payment Meth...	Amount	Unapplied	Settled	
1131	Mar 25, 2022	2159	3155	Check	\$450.00	\$0.00	<input type="radio"/> NO	<div>Receipt</div>
1137	Mar 25, 2022	2161	3155	Check	\$450.00	\$0.00	<input type="radio"/> NO	<div>Receipt</div>
1138	Mar 25, 2022	2161	3122	Check	\$79.50	\$0.00	<input type="radio"/> NO	<div>Receipt</div>
1143	Mar 25, 2022	2162	3155	Check	\$450.00	\$0.00	<input type="radio"/> NO	<div>Receipt</div>
1144	Mar 25, 2022	2162	65165	Check	\$1100.00	\$0.00	<input type="radio"/> NO	<div>Receipt</div>
1145	Mar 25, 2022	2163	65365	Check	\$750.00	\$750.00	<input type="radio"/> NO	<div>Receipt</div> <div>\$ Apply</div>
1146	Mar 25, 2022	2164	0021	Check	\$100.00	\$0.00	<input type="radio"/> NO	<div>Receipt</div>

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1 - 8 of 8 items

Refresh