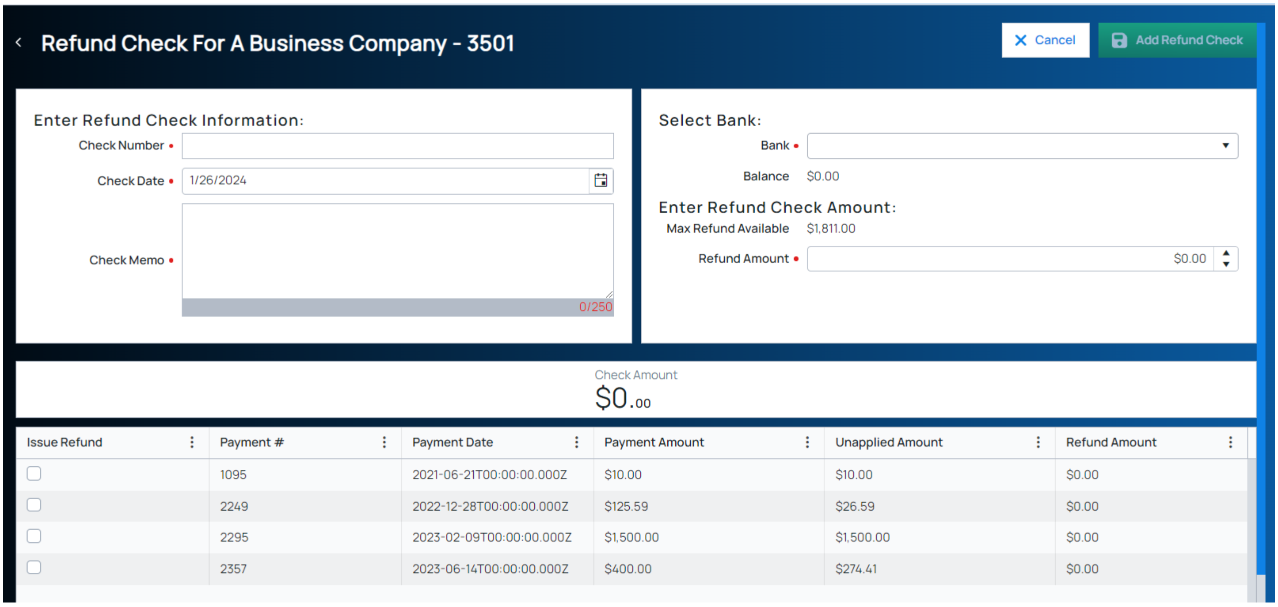
Payments Tab

Last Modified on 01/26/2024 12:48 pm EST

The Payments tab displays all payments received from the customer.

Issue Refund Check Button

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



Payment Hyperlink

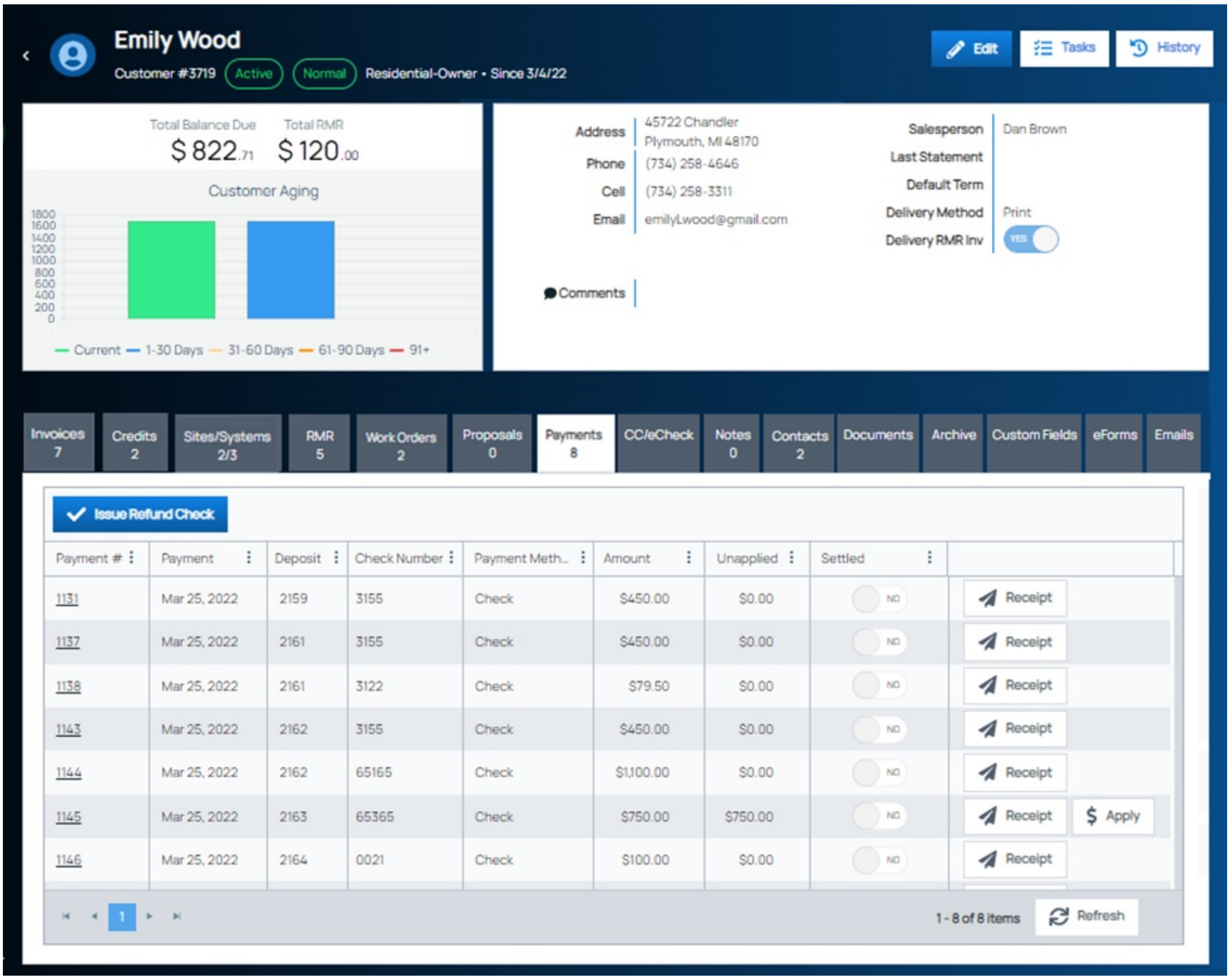
In the Payment # column, clicking on the hyperlink of a Payment will open the payment record for viewing.

Receipt Button

Clicking the Receipt button will open a dialog box where the user may 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 will create a .pdf file of the customer receipt. Users 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 will open a list of the customer's invoices with a balance due. The user 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
Comments
Salesperson
Dan Brown
Last Statement
Default Term
Delivery Method
Print
Delivery RMR Inv
YES
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
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 NO Receipt
1137 Mar 25, 2022 2161 3155 Check $450.00 $0.00 NO Receipt
1138 Mar 25, 2022 2161 3122 Check $79.50 $0.00 NO Receipt
1143 Mar 25, 2022 2162 3155 Check $450.00 $0.00 NO Receipt
1144 Mar 25, 2022 2162 65165 Check $1,100.00 $0.00 NO Receipt
1145 Mar 25, 2022 2163 65365 Check $750.00 $750.00 NO Receipt Apply
1146 Mar 25, 2022 2164 0021 Check $100.00 $0.00 NO Receipt
1
1 - 8 of 8 items
Refresh