


## Record Invoice Payments

Last Modified on 02/09/2023 8:30 am  
CST

When a Payer makes a cash or check payment, record it as a payment on unpaid or partially paid invoices. If your Payer has account credits, you can also apply the credit toward the invoice payment.

1. From the menu to the left, click **Accounting**.
2. Click **Income**.
3. Enter your Accounting PIN and click **Go**.

**Note:** If you do not have an Accounting PIN set, you are prompted to set one.

4. Locate the invoice for which to record payment. Filter suggestions are below.
  - Click the **Status** drop-down and select **Unpaid** and/or **Partial** to view only those invoices that have not been paid or have been partially paid.
  - Click the **Participant(s)** drop-down menu and select the participant(s) to view.
  - If you know the invoice number, click the **Invoice #** box and type it.
5. Click the row for the invoice to pay. The View Invoice page opens.
6. Click . The Payment for Invoice pop-up opens.

Payment for Invoice #10041

Payer:

Fresh Carrot

Cash

Check

Account Credit

Balance

\$75.00

Check #

Amount

\$ 75.00

Payment Date

09/29/2020

Notes

Send payment receipt?

☒ freshCarrot@yopmail.com

Cancel

Record Payment

7. Click the **Payer** drop-down menu and select the person who is making a payment.
8. Select **Cash**, **Check**, or **Account Credit**.

**Note:** The Account Credit option displays only if there is an existing account credit on the participant account.

9. Click the **Amount** box and enter the payment amount. This defaults to the invoice total. If you selected **Check** in **Step 7**, you can also enter the check number in the **Check Number** box.
  10. Click the **Payment Date** and select the date on which you received payment. This defaults to today's date.
  11. Click the **Notes** box and enter any notes about this payment.
  12. In the **Send Payment Receipt** section, check the box next to the payer email address to which to email a receipt. This option is not available when recording payments made with account credit.
  13. When finished, click **Record Payment**. If payment was made in-full, the invoice is moved to Paid status. If a partial payment was made, the invoice moves to Partial status.
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