

Recording part payments

In some cases, clients pay for part of their invoice on one day and then wish to pay the other parts later. This would be recorded as a part payment in the system and depending on how much is paid off, it would show differently on the order.

You would go to the **client's CDS** who wishes to pay off part of their order to begin and press the **Invoice** button found in the left-hand column to view the outstanding invoice. Press the **Manage Invoices** button at the bottom of the page and select the outstanding invoice you wish to add a payment against, finally press the **To Checkout** button.

Shopping Basket Summary	Payment Method		
Order No 2226 Order Total £20.00 Order Outstanding £20.00	Pay In Full Cash	<input type="text"/>	
	Pay In Full Cheque	<input type="text"/>	Cheque No <input type="text"/>
	Pay In Full Credit Card	<input type="text"/>	Card No <input type="text"/> -XXXX-XXXX-
	Pay In Full Debit Card	<input type="text"/>	Card No <input type="text"/> -XXXX-XXXX-
	Pay In Full Direct Payment	<input type="text"/>	Ref No <input type="text"/>
	Total	£0.00	
	Outstanding	£20.00	
	Payment Date	<input type="text" value="05-May-2022"/>	
	Record Payment Details		
	Exit		

In the example above, the client has an outstanding invoice for £20.00. If the client wanted to pay £10.00 for this order today, you would input this value into the payment method they are using and then press Record Payment Details.

Create Comm	2226	Olivia Andrews - CN: 267; Due: 01-Apr-2021; Term: April 2021	£20.00 Part Paid
		Swimming - April 2020 - Intermediate - Sokrates Academy - CN: 267	£0.00 Paid
		Lesson 1 - Wednesday 07-Apr-2021 - 05:00:00 PM - 30 mins	£5.00 Paid
		Lesson 2 - Wednesday 14-Apr-2021 - 05:00:00 PM - 30 mins	£5.00 Paid
		Lesson 3 - Wednesday 21-Apr-2021 - 05:00:00 PM - 30 mins	£5.00 Outstanding
		Lesson 4 - Wednesday 28-Apr-2021 - 05:00:00 PM - 30 mins	£5.00 Outstanding
		Payment - Receipt no: 1076 05-May-2022 13:21:18	-£10.00
		Cash	-£10.00
		Total Payment	-£10.00
		Swimming - April 2020 - Intermediate - Sokrates Academy - CN: 267	£0.00 Paid
		Lesson 1 - Wednesday 07-Apr-2021 - 05:00:00 PM - 30 mins	£5.00 Paid
		Lesson 2 - Wednesday 14-Apr-2021 - 05:00:00 PM - 30 mins	£5.00 Paid
		Total Items Paid	£10.00
		Balance	£10.00

Back on the Invoices page of the CDS, you will see the invoice now has a status of Part Paid. As the lessons are £5.00 each, the payment of £10.00 has paid off two of the four total lessons, meaning two lessons have the status of Paid and the remaining two have the status of Outstanding.

If the client had paid an odd amount, £7.00 for example, one lesson would have the status of paid and there would be an Overpayment of £2.00.

The word Overpayment gives the impression that the client has paid too much money, however, in this context it just means that the £2.00 couldn't be allocated against the invoice as it is not enough to pay off a full lesson. The system will create a credit for £2.00 which will then be allocated against the invoice when the rest of the money is paid.

The total remaining balance for an order will always show at the bottom of the invoice in bold against **Balance**, so you are always aware of how much money is left to pay.

When the final payment comes in and the order is paid off completely, it will disappear from the Manage Invoices page and the status will show as Paid in the Invoices section of the CDS.