Payments on 1place (incomplete)

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Help Topics

Payments on 1place

Overview of the Payments Feature

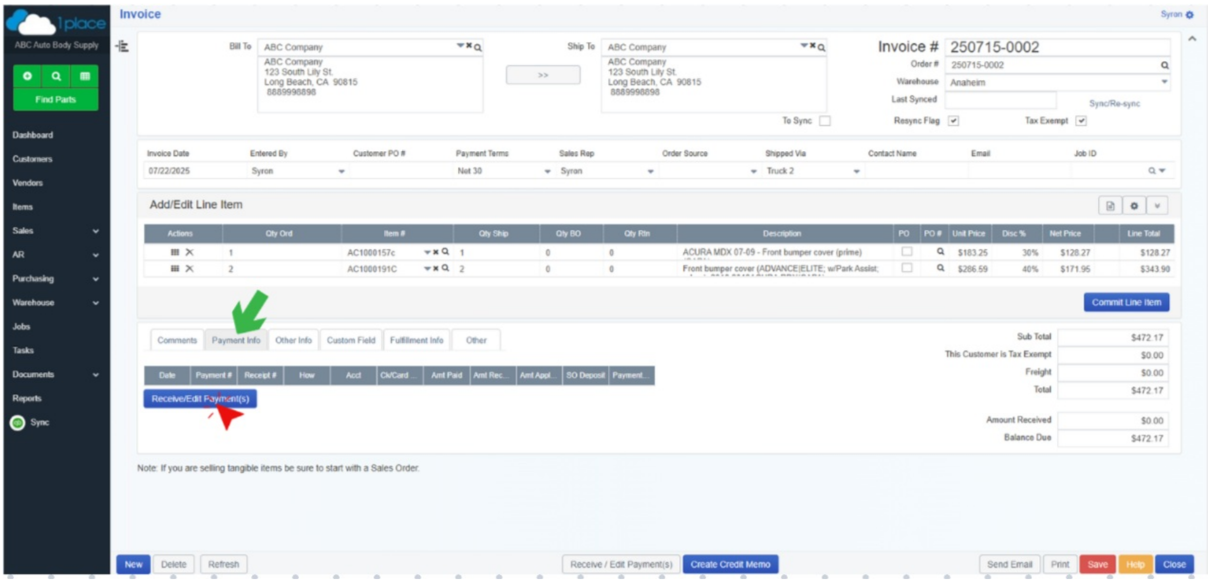
The **Payments** feature in 1place allows users to process payments directly on **Sales Orders** and **Invoices** using various **payment methods** — including *Cash, ACH, Check, Credit Card, Credit Memo, Email Pay, and Wire Transfer*.

Authorized users can also **edit or delete payments** when necessary, giving flexibility in managing customer transactions and ensuring accurate records.

How to access the Payments Screen

To open the Payments screen in 1place:

1. Go to a **Sales Order** or **Invoice**.
2. Click on the **Payment Info tab** located below the line items on the left side of the screen.
3. Click the **Receive/Edit Payments button**.
4. The **Payments screen** will open, allowing you to enter or manage payments for the selected order or invoice.



Processing Payments

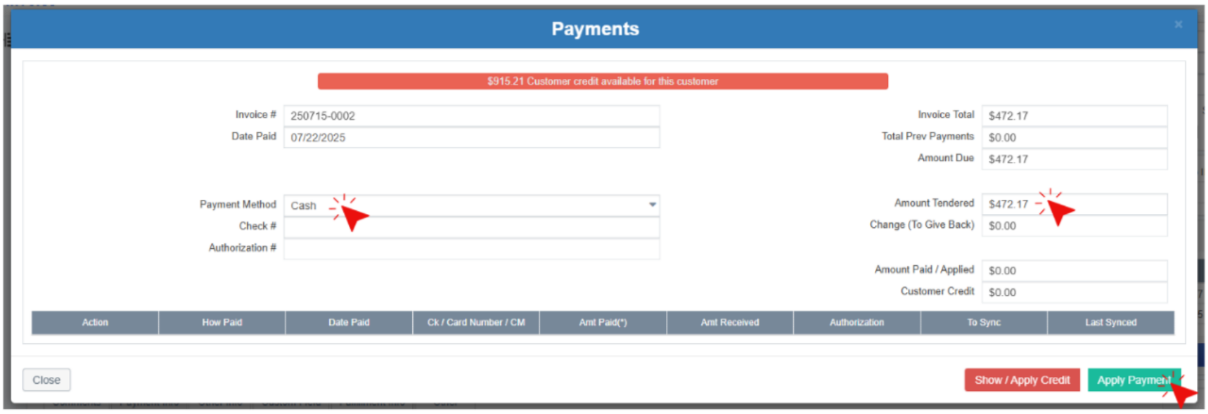
In 1place, you can process payments on Sales Orders and Invoices using a variety of **payment methods**. Whether the customer pays by **Cash, ACH, Check, Credit Card, Credit Memo, Email Pay, or Wire Transfer**, the payment process follows the same basic steps — select the correct transaction, choose the appropriate payment method and enter appropriate details, enter the amount received, and apply the payment.

Each payment method may have unique handling or processing requirements, which we'll cover in the following sections.

Cash Payments

To record a **cash** payment on a Sales Order or Invoice:

1. Make sure you have the correct **Sales Order** or **Invoice** open.
2. Click the **Payment Info** tab, then click **Receive/Edit Payments** to open the **Payments screen**.
3. Confirm the **physical cash** amount received from the customer.
4. In the **Payments screen**, select **Cash** as the **payment method.**
5. Enter the amount received in th**e Amount Tendered** field.
6. Click **Apply Payment** to process and record the cash payment.

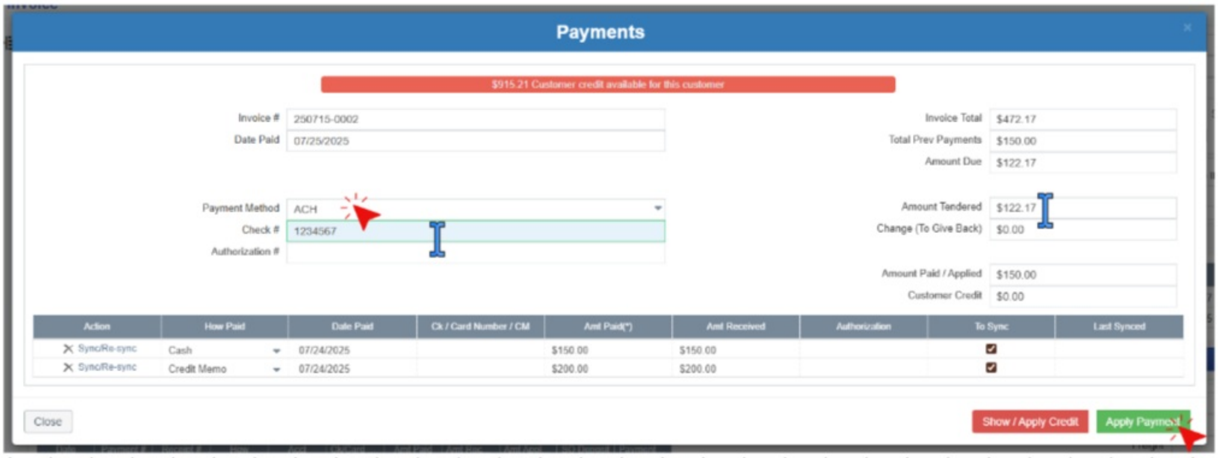


ACH Payments

To record an **ACH payment** on a Sales Order or Invoice:

1. Make sure you have the correct **Sales Order** or **Invoice open**.
2. Click the **Payment Info** tab, then click **Receive/Edit Payments** to open the **Payments screen**.
3. In the **Payments screen**, select **ACH** as the **payment method.**
4. Enter the payment amount in the **Amount Tendered** field.
5. Enter any relevant ACH details (e.g., **Bank Account Number**, **ABA Routing Number**, or other internal notes) for tracking purposes.
6. Click **Apply Payment** to process and record the ACH payment.

Always verify bank details with the customer and ensure proper authorization before processing ACH payments.



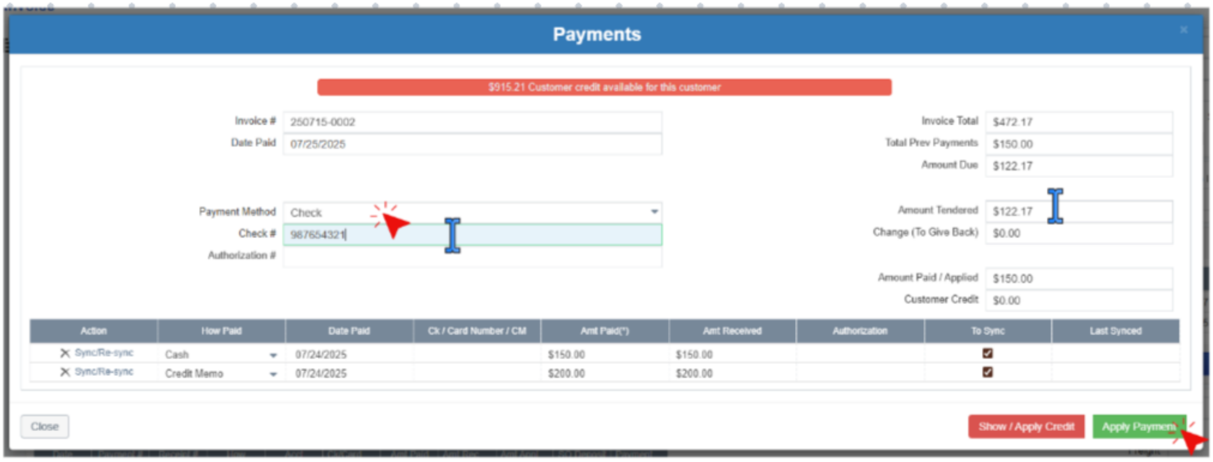
Check Payments

To record a **Check payment** on a Sales Order or Invoice:

1. Make sure you have the correct **Sales Order** or **Invoice** open.

2. Click the **Payment Info** tab, then click **Receive/Edit Payments** to open the **Payments screen**.
3. In the **Payments screen**, select **Check** as the **payment method**.
4. Enter the payment amount in the **Amount Tendered** field.
5. Enter any relevant **check details** (e.g., **Check Number**, **Authorization Number**, or other notes) for internal tracking.
6. Click A**pply Payment** to process and record the check payment.

Always verify the check details and ensure the payment is authorized before processing.

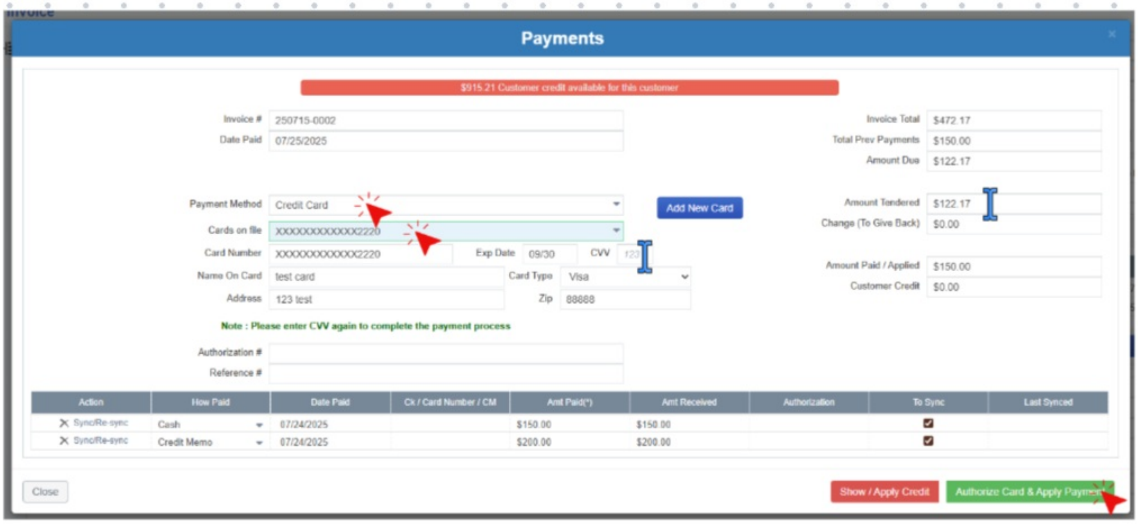


Credit Card Payments

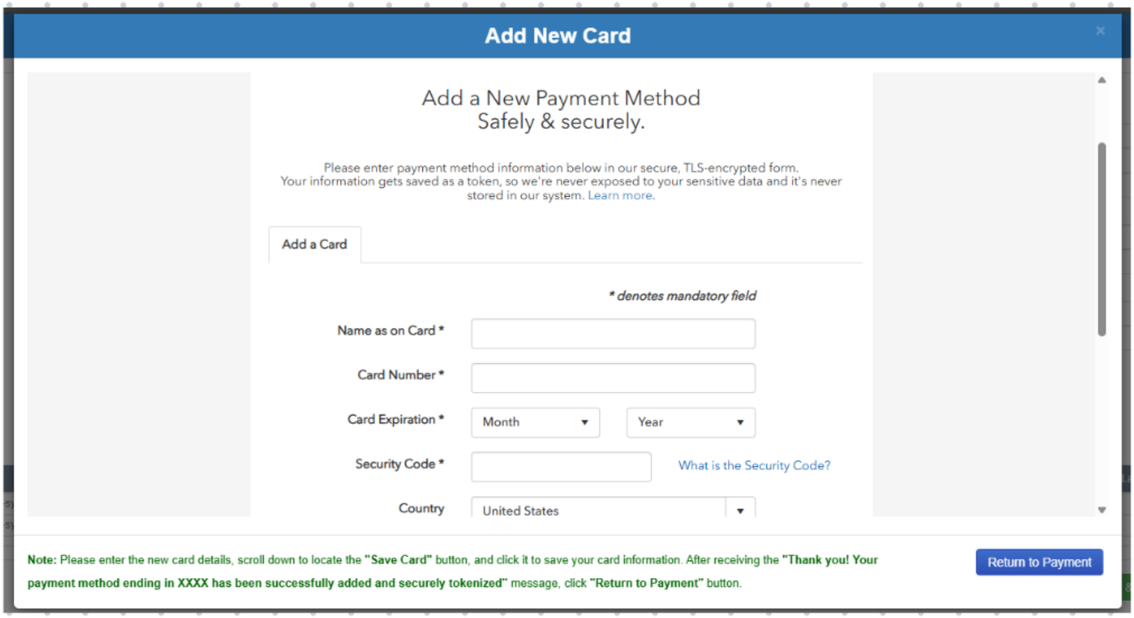
Processing Payments Using Credit Card (via EBizCharge)

To record a credit card payment on a Sales Order or Invoice:

- Make sure you have the correct **Sales Order** or **Invoice** open.
- Click the **Payment Info** tab, then click **Receive/Edit Payments** to open the **Payments screen**.
- In the **Payments screen,** select **Credit Card** as the **payment method**.
- Enter the payment amount in the **Amount Tendered** field.
- Select the **credit card** to be charged from the dropdown below the payment method. This list will show any existing cards on file.
    - Confirm the **card details** with the customer and request the **CVV** to proceed with the payment. The **CVV** (Card Verification Value) is the **3-digit code** on the back of a credit card (or 4-digit on the front for American Express).



- If the customer wants to use a new card, click **Add New Card**.
  - The EBizCharge "**Add a New Card**" form will appear.
  - Fill out the required cardholder information and click **Save Card**.
  - Then click **Return to Payment** at the bottom-right corner of the form.



- Click **Authorized Card and Apply Payment** to process and record the credit card transaction.

  *All credit card transactions are securely processed through **EBizCharge**. Always confirm the customer's authorization before proceeding.*

Applying Credit Memo on Payments

To apply a credit memo to a Sales Order or Invoice:

1. Make sure you have the correct **Sales Order** or **Invoice** open.

2. Click the **Payment Info** tab, then click **Receive/Edit Payments** to open the **Payments screen.**
3. t the top of the **Payments screen**, you'll see the **total available credit** for the customer, highlighted in **red** — this amount can be applied toward the payment.
4. In the Payments screen, select **Credit Memo** as the **payment method.**
5. Enter the credit amount to apply in the **Amount Tendered** field.
6. Click **Apply Payment** to complete the process.

   Credit memos are typically issued for returns, adjustments, or overpayments and can be used to reduce the amount owed.

Email Pay Payments

To send a payment request via Email Pay for a Sales Order or Invoice:

1. Make sure you have the correct **Sales Order** or **Invoice** open.
2. Click the **Payment Info** tab, then click **Receive/Edit Payments** to open the **Payments screen**.
3. In the **Payments screen**, select **Email Pa**y as the payment method.
4. Enter the amount to be paid in the **Amount Tendered** field.
5. Ask the customer for the **email address** where the payment link should be sent.
6. Click **Pay via Email** to send the payment request.
7. Advise the customer to check their email and click the "**Click to Pay**" button in the message. They will be directed to a **secure payment page** where they can enter their **credit card information** and complete the payment.

   Once the customer pays, the transaction will be recorded in 1place and reflected on the corresponding order or invoice.

Wire Transfer Payments

To record a Wire Transfer payment on a Sales Order or Invoice:

1. Make sure you have the correct Sales Order or Invoice open.
2. Click the Payment Info tab, then click Receive/Edit Payments to open the Payments screen.
3. In the Payments screen, select Wire as the payment method.

4. Enter the payment amount in the Amount Tendered field.

5. Enter any relevant wire transfer details (e.g., Bank Account Number, Routing Number, Reference Number, or internal notes) for tracking purposes.

6. Click Apply Payment to process and record the wire transfer.

   The information entered is for recording purposes only. Be sure to confirm wire details with the customer and verify that the funds were received.

Payment History and Actions

Viewing Payment History in 1place

You can easily view the payment history for any Sales Order or Invoice directly within 1place:

1. Open the relevant **Sales Order** or **Invoice**.

2. Click on the **Payment Info** tab.

3. At the bottom of the tab, you'll find a table listing all recorded payments with the following columns:

   - **Action** – Edit or delete a payment (if authorized).
   - **How Paid** – Payment method used (e.g., Cash, ACH, Credit Card).
   - **Date Paid** – The date the payment was recorded.
   - **Ck / Card Number / CM** – Reference information, such as check number, last digits of the card, or credit memo ID.
   - **Amt Paid** – Amount allocated/applied to the order or invoice.
   - **Amt Received** – Total amount received from the customer.
   - **Authorization** – Any authorization number related to the transaction.
   - **To Sync** – Indicates if the payment is queued to sync with an external system (like QuickBooks).
   - **Last Synced** – Shows the last time the payment was synced.

This table gives a complete view of how, when, and where each payment was handled. Only users with proper permissions can modify or delete entries.

Reviewing Invoice Balance

Here are the places where you can check the remaining balance or amount due on an invoice:

1. On the Invoice Screen

- Open the **Invoice** and look at the bottom right section of the page.
- The **Balance Due** is clearly displayed — this shows the remaining amount the customer owes.

2. On the Payment Screen

1. Click the **Payment Info** tab, then select **Receive/Edit Payments**.
2. On the right side of the payment screen, you'll see a summary that includes:
    - Invoice Total
    - Total Previous Payments
    - Amount Due
3. The **Amount Due** reflects the outstanding balance on the invoice.
4. Also, the **Amount Tendered field** will automatically populate with the amount due, but you can adjust it if the customer is making a partial payment.

Deleting Payments

If a payment was entered by mistake or needs to be removed, authorized users can delete it directly from the Payment Info tab.

How to Delete a Payment:

1. Open the relevant Sales Order or Invoice.
2. Click on the Payment Info tab to view the payment history.
3. In the Action column of the payment you want to remove, click the (X) button.
4. A confirmation prompt will appear asking: "Are you sure?"
5. Click Yes, then click OK to confirm the deletion.
    - Or click Cancel to keep the payment and exit the prompt.

Important: Deleted payments are permanently removed from the transaction record and may affect invoice balances and syncing. Make sure to double-check before confirming.