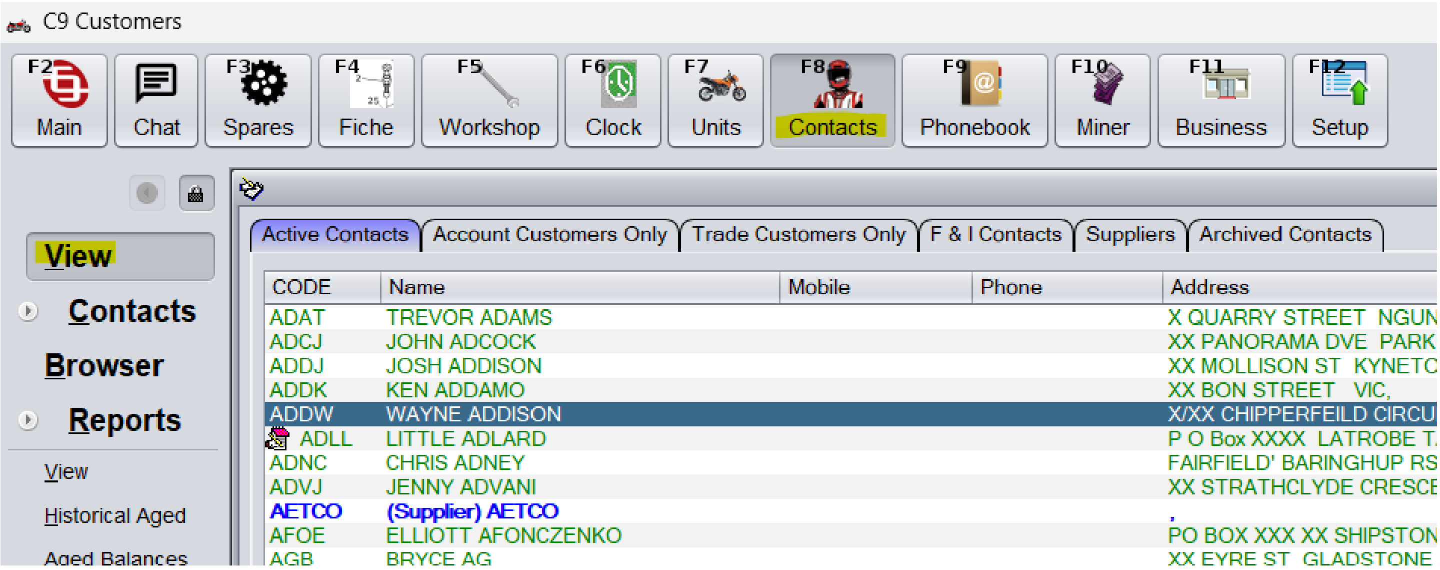
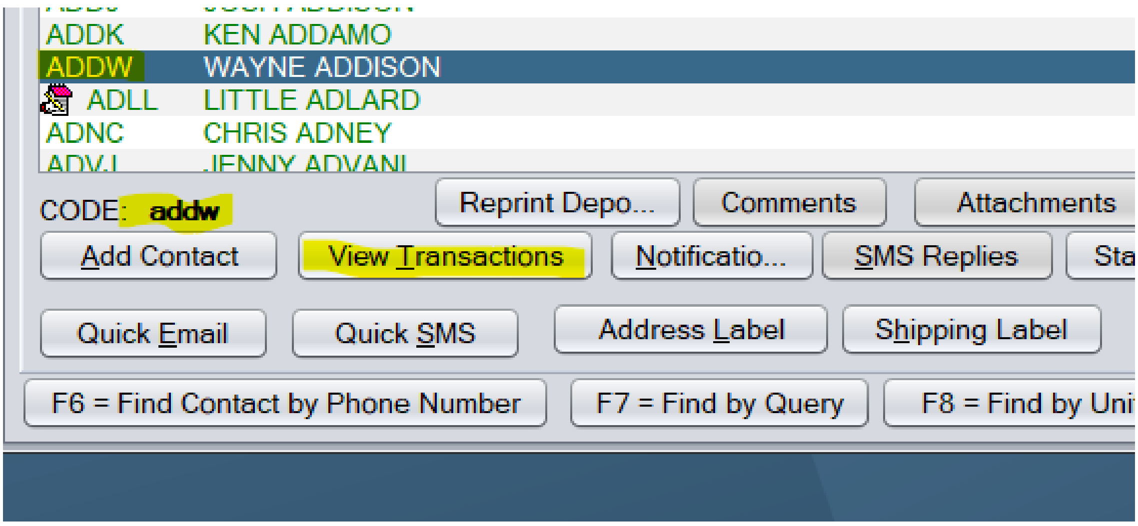
Recording a payment against an account customer.

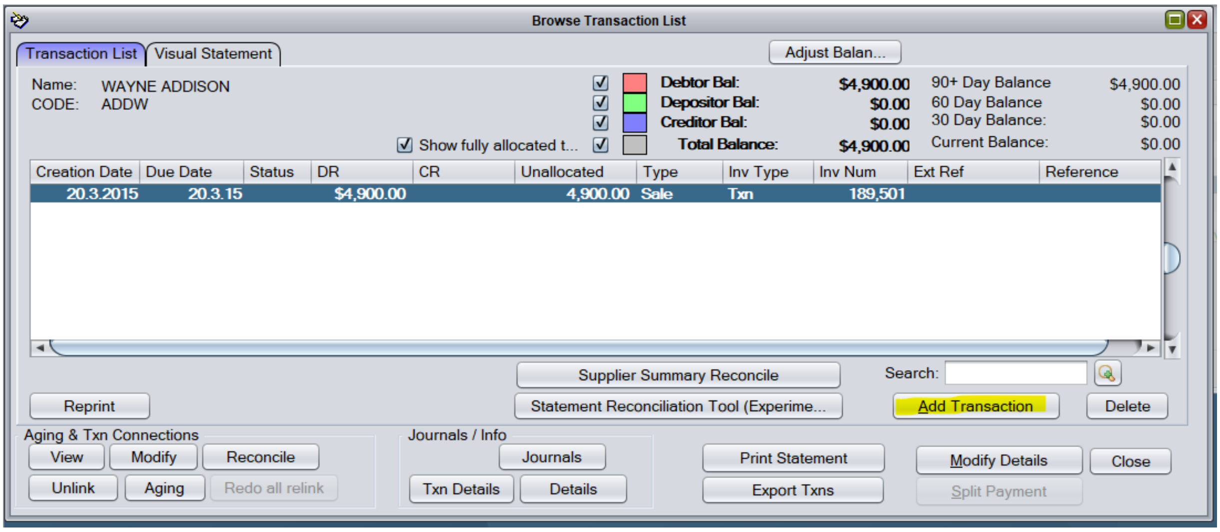
To record a payment from a customer against their account, first head to Contacts→View.



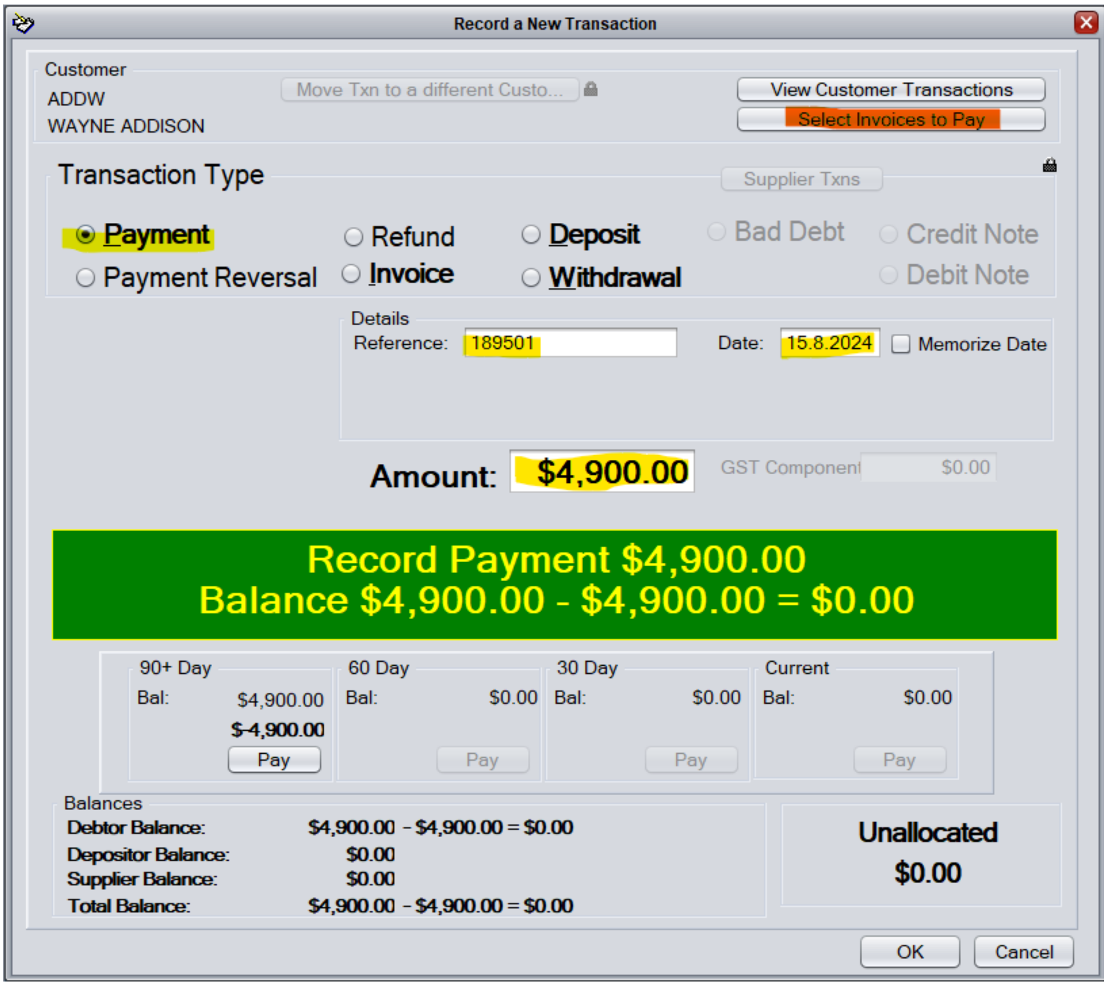
Find the customer using your preferred method. In the example above I have used the customer code to search for Wayne Addison. Highlight the customer and click View Transactions button.



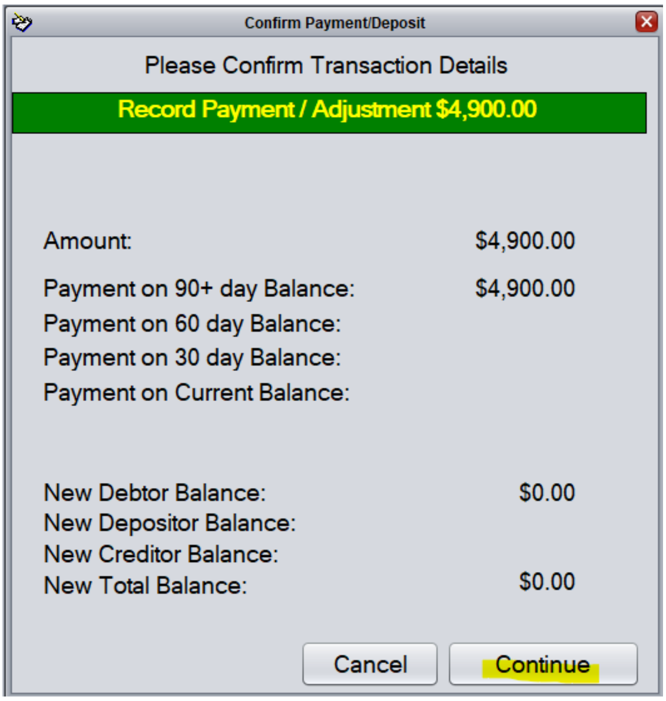
Click the button that says Add Transaction.



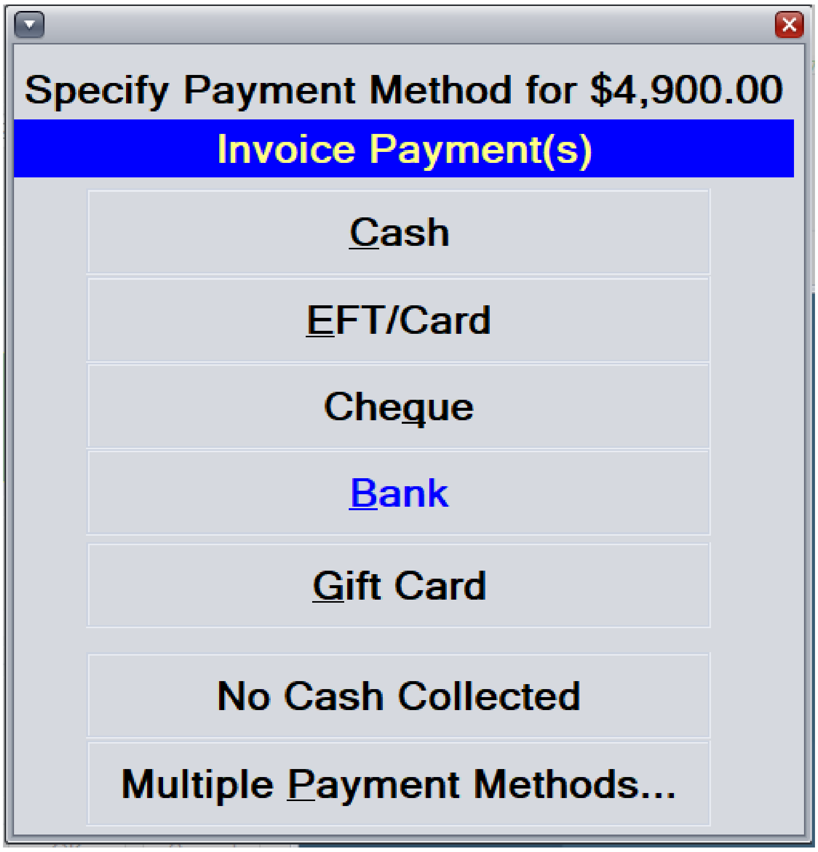
Enter the details of the payment (ensuring Payment is selected as the transaction type) including the amount, a reference number for your own records and the date. You can also click the Select Invoices to Pay button if you wish to reconcile the payment against specific invoices on the customer account (highlighted in red).



Once all the necessary details have been entered, click OK. The screen that follows is a transaction confirmation screen, click Continue to continue forward or cancel if you have made a mistake.



Select the payment method.



Finalise the transaction as per any normal paid transaction from here.