

Recording a payment against an account customer.

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

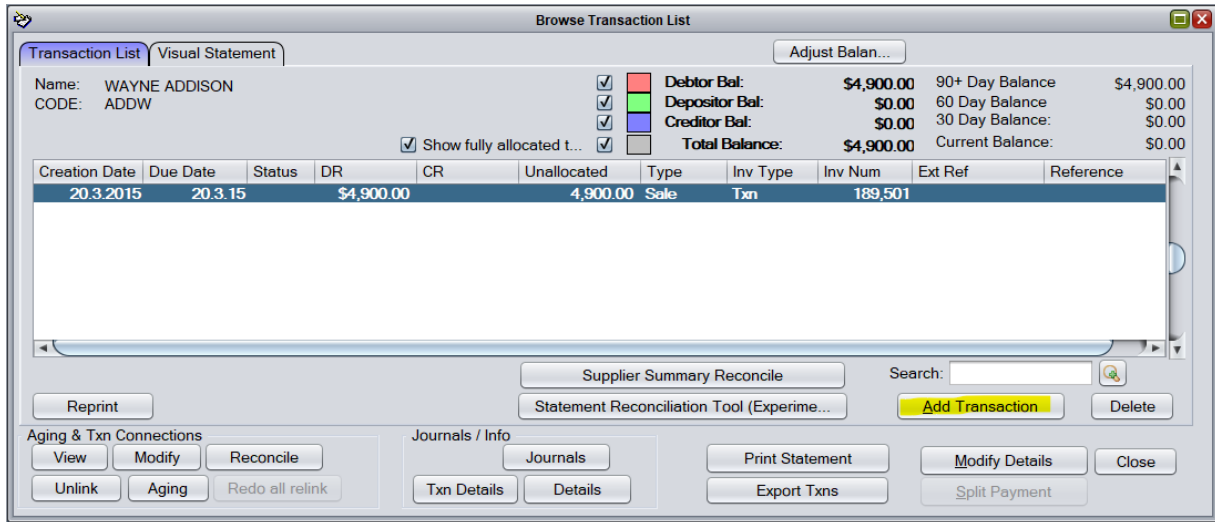
The screenshot shows the 'C9 Customers' software interface. At the top, there is a menu bar with function keys F2 through F12, each with an icon and a label: Main, Chat, Spares, Fiche, Workshop, Clock, Units, **Contacts**, Phonebook, Miner, Business, and Setup. Below this is a navigation pane on the left with 'View' selected, and sub-options for 'Contacts', 'Browser', and 'Reports'. The main area displays a list of contacts under the 'Active Contacts' tab. The list has columns for CODE, Name, Mobile, Phone, and Address. The contact 'WAYNE ADDISON' with code 'ADDW' is highlighted. Below the list, there are several buttons for actions like 'View Transactions', 'Quick Email', etc.

CODE	Name	Mobile	Phone	Address
ADAT	TREVOR ADAMS			X QUARRY STREET NGUN
ADCJ	JOHN ADCOCK			XX PANORAMA DVE PARK
ADDJ	JOSH ADDISON			XX MOLLISON ST KYNETC
ADDK	KEN ADDAMO			XX BON STREET VIC.
ADDW	WAYNE ADDISON			X/XX CHIPPERFEILD CIRC
ADLL	LITTLE ADLARD			P O Box XXXX LATROBE T.
ADNC	CHRIS ADNEY			FAIRFIELD BARINGHUP RS
ADVJ	JENNY ADVANI			XX STRATHCLYDE CRESC
AETCO	(Supplier) AETCO			
AFOE	ELLIOTT AFONCZENKO			PO BOX XXX XX SHIPSTON
AGB	BRYCE AG			XX EYRE ST GLADSTONE

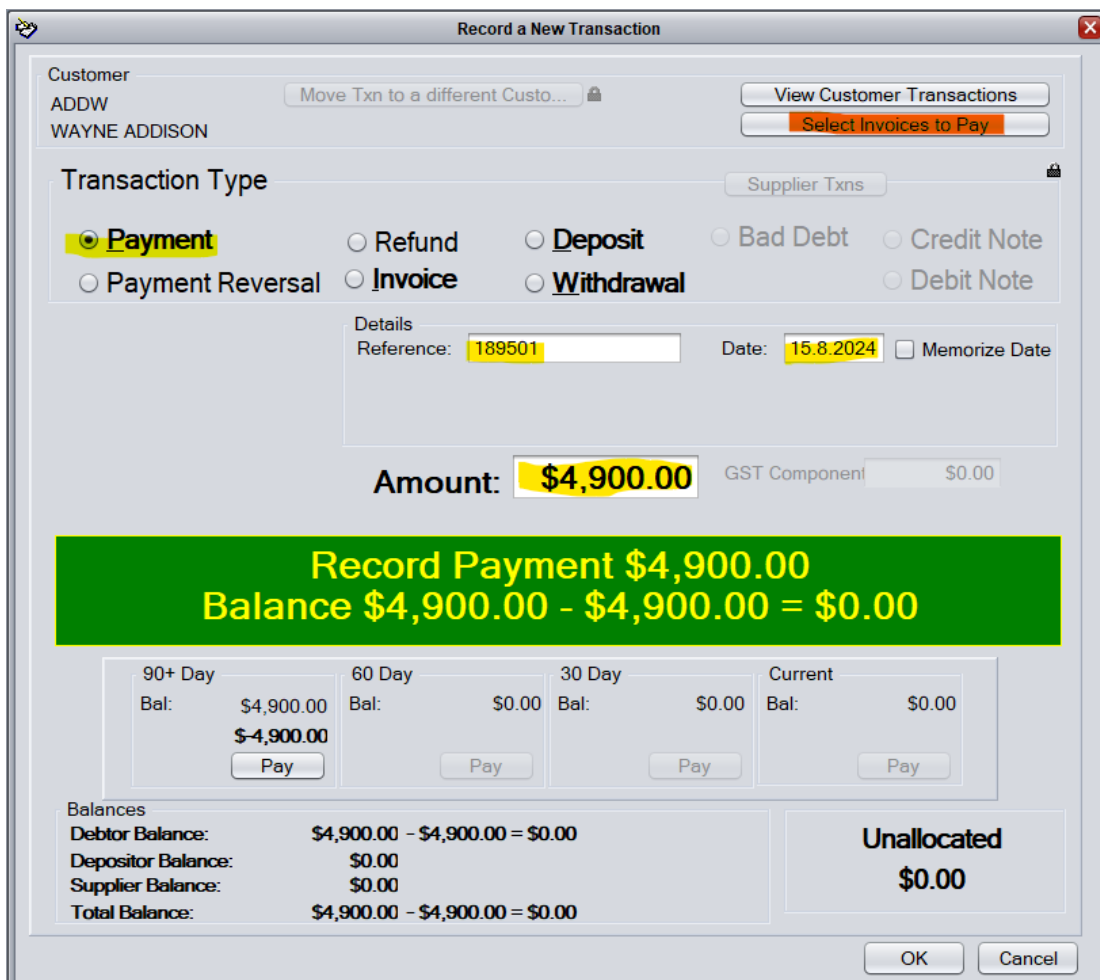
Find the customer using your preferred method. In the example above I have used the customer code to search for Wayne Addison. Highlight the customer and click View Transactions button.

This is a close-up of the customer record for Wayne Addison. The 'CODE' field contains 'addw'. Below the list of contacts, the 'ADDW WAYNE ADDISON' entry is highlighted. A row of buttons is visible, including 'View Transactions', 'Quick Email', 'Quick SMS', 'Address Label', and 'Shipping Label'. At the bottom, there are instructions for function keys: 'F6 = Find Contact by Phone Number', 'F7 = Find by Query', and 'F8 = Find by Uni'.

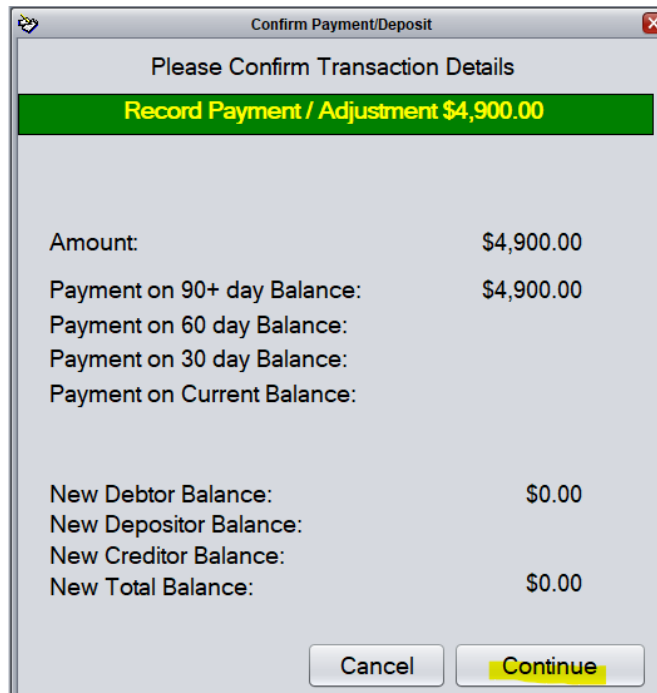
Click the button that says Add Transaction.



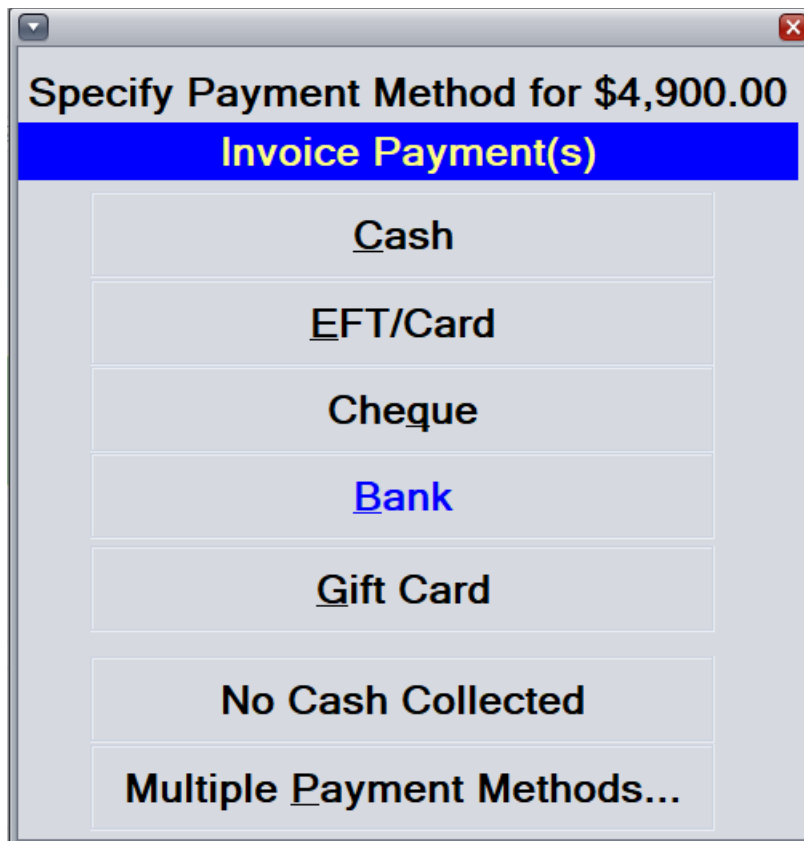
Enter the details of the payment (ensuring Payment is selected as the transaction type) including the amount, a reference number for your own records and the date. You can also click the Select Invoices to Pay button if you wish to reconcile the payment against specific invoices on the customer account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