Taking Payment

this article is incomplete

Sales Screen

Taking payment on the Sales Screen

Work Order (Deposit)

When converting a Quotation to a Work Order (WIP), you will be presented with an oppurtunity to accept a deposit:

• You can check the box: Take deposit later if you don't wish to capture a deposit payment now

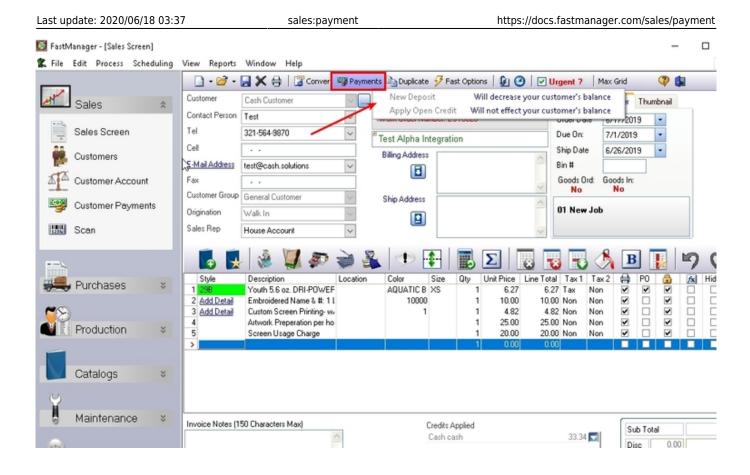
convert-wip-deposit.mp4

On the Sales Screen, you can capture a new deposit using the Payments button

• you can also use this button to apply an existing open credit to the order

The Payments button will not be available on a Quotation. You will have to convert your order to a WIP or Invoice in order to capture a payment





Invoice (Payment)

On the Sales Screen, you can capture a payment new using the Payments button

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FastManager Help Manual - https://docs.fastmanager.com/

Customer Payment Screen

On the navigation pane at the left, expand the section: Sales and click on Customer Payments

Here you can capture a payment for any customer and apply the payment to any combination of Invoices or Work Orders

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A payment to a Work Order will be applied as a *Deposit*.

Customer Account Screen

note

Although cannot actually process a *new* payment on the Customer Account screen, you can *apply* any existing payments or credits to outstanding Invoices

- Select the payment from the list and click on Apply to apply that payment to an Invoice
 - or click on UnApply to see a list of the Invoices that it was already applied to (and/or to unapply the payment from any or all of those Invoices)

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You cannot apply payments to *Work Orders* from the Customer Account screen. Use the Sales Screen for that

For more about the features and options on the Customer Account screen, click here

Payment Processor Integration

Currently, FastManager supports integration with the following payment processors:

• PayJunction

not8

ChargeltPro

First, you will need to sign up as a new customer with one of these and acquire your account login information. The different information required for each payment processor can be viewed within each one's corresponding setup screen in FastManager, at: File -> Merchant Setup

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If you select ChargeltPro, you will need to contact them directly to assist with the setup (they will enter or provide the information that is needed in their setup):

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← Sales: Overview

Purchasing ⇒

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