

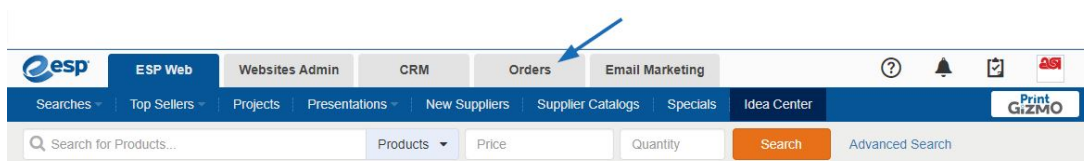


ESP Quick Tip #74: Apply a Payment to an Invoice

2024-07-17 - Jennifer M - ESP Quick Tips

During the order process, ESP Web enables you to create an invoice for the customer, as well as track payment information.

The first step is to [log into ESP Web](#) and click on the Orders tab.



If you have already created an invoice, click on the Invoices tab in the Orders area. Locate the invoice and click on the order number.

Note: If an invoice has not yet been created, one can be [created from the main order](#).



Invoices

The screenshot shows the 'Invoices' section of the ESP Web interface. A blue arrow points to the 'Invoices' tab. Below the tabs is a search bar with the text 'Search by product, supplier, etc.'. Below the search bar is a table with the following columns: Order #, Customer, Date, In-Hands Date, Total, and Status. The first row of the table has the order number 'ASI-455607' circled in blue.

<input type="checkbox"/>	Order #	Customer	Date	In-Hands Date	Total	Status
<input type="checkbox"/>	ASI-455607	ABC Company	5/12/24		\$512.51	Open
<input type="checkbox"/>	ASI-455601	20 Degrees Below	11/3/23	12/9/23	\$21,601.32	Open

Scroll to the bottom of the invoice and click on the Enter Payment button.

Note: If the Enter Payment button is not available, go to the [Company Profile section of the Admin Settings](#) to enable this option.

Subtotal:	\$483.50
Discount:	0.00% \$0.00
Booked Margin:	\$191.70 39.65%
Sales Tax:	\$29.01
? Use Current Rates	
Total Amount:	\$512.51
Amount Paid:	\$0.00
Enter Payment	Amount Due: \$512.51


The Enter Payment window will appear. To indicate a payment for the entire balance, check the "Pay in Full" option. To indicate a partial payment, uncheck this box. Use the Pay With drop-down to indicate the type of payment, such as Check, Credit Card, etc. The date will automatically default to the current date but can be changed using the calendar icon. If desired, enter a transaction number and/or notes in the available boxes.

When you are finished, click on the Save button.

Invoice #ASI-455607 - Enter Payment ×

Payment	Pay With	Transaction Number	Date
512.51 USD ▾	▾		07/17/2024
<input checked="" type="checkbox"/> Pay in full	Note		
	<div></div>		
		<div>Cancel</div>	<div>Save</div>

The pricing information for the invoice will be updated to reflect the amount entered. If the amount was paid was paid in full, the Enter Payment button will not be displayed.

Subtotal:		\$483.50
Discount:	<input type="text" value="0.00%"/>	\$0.00
Booked Margin:		\$191.70
		39.65%
Sales Tax:		\$29.01
 Use Current Rates		
Total Amount:		\$512.51
Amount Paid:		\$512.51
Amount Due:		\$0.00