Payments

Enter Payments on the Log, Payments tab. Enter Date, Client, (Payment) Amount, the Description is automatic but can be changed and added to and you can create your own auto-description that will on Payment entry. Use Contact Us to have Customer Service help you.

Returned Payment (returned check): If a payment is returned from the clients' bank, record that on the Payment Log tab as you would a payment, but Put a minus sign in front of the amount. Example: $500 check returned; enter as -$500.

Return unused payments to client: Make a normal payment entry, press the **Auto Compute Client Refund** button. In description erase "Payment Received…." And enter something like: "Client payment refund."

To make a private note on payment that you do not want to appear on statement in curly brackets {}, enter the note. Example: {this payment paid from company}.

You can enter payments on the Prebill also. Same Instructions.

End - April 9, 2025