

## QRG PAY.7 – Allocating a Payment

1. From the customer's account select the Billing tab
2. Click on the payment that will be allocated
3. From the Payment use the drop down arrow on the top right of the screen and select Allocations
4. From the Payment Allocation screen select the invoice to apply the payment to and enter the payment value in the Amount box
5. Click Allocate at the top of the screen

The screenshots show the following steps:

- Step 1:** In the customer account, the 'Billing' tab is selected in the top right corner.
- Step 2:** A payment card for 'P-24760' is clicked.
- Step 3:** The dropdown menu for the payment is open, and 'Allocations' is selected.
- Step 4:** In the 'PAYMENT ALLOCATION' screen, an invoice line is selected in the 'Invoice Lines' table.
- Step 5:** The 'Allocate' button is clicked at the top right of the screen.

| ACCOUNT NAME | AMOUNT   | ALLOCATION | UNALLOCATION |
|--------------|----------|------------|--------------|
| Scott Mappes | \$140.00 | \$0.00     | \$0.00       |

  

| Select                              | Invoice | Total Amount | Payments | Debits | Credits | Balance  | Amount |
|-------------------------------------|---------|--------------|----------|--------|---------|----------|--------|
| <input checked="" type="checkbox"/> | INV-... | \$140.00     | \$0.00   | \$0.00 | \$0.00  | \$140.00 | 140.00 |