Sending Payment Requests & Using the Payment List

Last Modified on 10/30/2023 1:10 pm EDT

Order Time inventory allows you to receive payments on orders and shipping documents and sync those payments into QuickBooks. It will sync all payments from QuickBooks over into Order Time as well.

You can manage credit card security settings and enable "Send Payments" through Settings > Company Preferences > Payments.

The payment processing gateways should be set up first before you start requesting payments. Refer to Payment Gateway for more details. Your Payment Gateway also needs to have a default Payment method selected.

Company Preferences	
Section	Payment
General	✔ Mask credit card number (e.g. xxxx-xxxx-5678)
Activities	💽 Enable 'Send Payment Request'
Doc #s	Processing Requirements
ltems	
Inventory	 Allow saving credit card payment without processing.
Sales	Warn if saving a credit card payment and the card has not been processed.
Shipping	 Block unprocessed credit card payments from being saved.
Payments	AV Requirements for processing credit cards
Purchasing	Require both Billing Address and Zip
Receiving	Require Billing Address
Production	Require Zip
Lot / Serial #s	Require either Billing Address or Zip
All Orders Mobile	Require neither Billing Address nor Zip
	Put Gateway transactions in test mode.

In the Sales Order you will now see a Payments Tab that will always be available. Here you can receive payments:

Sale Order - 16 Control Contro Control Control Contro Control Control Control Control Control C	ied By Veronica Marcano 1/29/2019
General Implication	Status Processing
We 196 Users 1/30/318 Users 1/30/31	
Currant Additions State of State	30.00
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Here you can receive payments:

1. Click the **+***Request Payments* button.

Sales + Sales Orders + Sale Order				Created By V	eronica Marcano 1/29/2019 12:16 PM Mod	fied By Veronica Marcano 1/29/2019 12:16 PM
Sales Order - 166 EDIT Create PDF -						Status Processing T
General	Bill Address		Ship Address		Summary Revision : 1	
No. 166	ABERDEEN SCHOOL DISTRICT				Subtotal	30.00
Customer Aberdeen School District	216 N. "G" ST. ADEDDEEN WA 08520				Ship Amount	0.00
Date 1/29/2019 Promise Date 1/29/2019	ALADLA, 119 2022				Discount \$	-0.00
Customer PO 12363					Taxes	0.00
Contact					Total Amount	30.00
					Paid Amount	-0.00
					Balance	30.00
Items Details Memo & Instructions Custom Payme	nts Ship Docs Dependency Attachments	Open Activities	Activity History			Add Image: Request Payment
DATE TENDER TYPE	AMOUNT	APPLIED AMOUNT	u	NAPPLIED		ACTIONS

2. The *Send Email* -up window will appear. In here, select the "Sales Order/ Ship Doc Payment Email" Template that contains a special a payment link. Your customer can use that Payment link to apply the payment to the Sale Order/Ship Doc.

By default, the payment link is already on the Email Template. Do NOT delete the link token. It looks like this: **{!link}**

Bill A	ddress			Ship Address		
ABERI 216 N	DEEN SCHOOL DISTR . "G" ST.	ICT				
ABERI	DEEN, WA 98520					
S	end Email					- ×
	Contact:			Ŧ		A
	Additional To:	veronica@numb	bercruncher.com;			
	CC:					
ments	BCC:					
	Template:	Sales Order Pay	iyment Email	Ŧ		
	Subject:	Payment Reques	est for Sales Order #166			
	Body:	Dear			-	
		We are sending	<u>e this email to requ</u> est paymen	t for Sales Order # 166 in the amount of	of	
		30.00. Please fo	follow this link to make your p	ayment.		11
	Attachment:	Attach File				
		FILE:	SIZE:	ACTION:		
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When the customer clicks on the link in the email it will direct them to a secured window where they will enter all of their credit card information and submit the payment using the "PAY NOW" Button.

	PAYMENT REQUEST	
	Applications2U	
No.	514	
Date	2/5/2019	
Open Amount	56.00	
Name on Card		
Credit Card No.		
Security Code		
Exp. MM/YYYY	01 🔻 2019 💌	
Credit Card Address		
Credit Card Zip/Postal		
Email		
PAY NOW		

The payments that are made using the Payment Link will then appear under the Payments tab.

es Order - 514 Create P	DF 👻					Status Approved
neral		Bill Address		Ship Address	Summary Revision : 1	
No. 514 Customer 1496 Ontario Date 2/5/2019 Promise Date 2/5/2019 Customer PO Contact DO this O Test Cust Field	Inc.	1496 ONTARIO INC. 123 VONGE ST SUITE 3008 TORONTO, ON M4V 3T5 CA		1496 ONTARIO INC. 123 YONGE ST DEROTO, ON MAY 3TS CA	Subrotal UPS Discount \$ Taxes Total Amount Pald Amount Balance	51.00 5.00Tax -0.00 0.00 56.00 -56.00 0.00
ems Details Men	no & Instructions Payment	Ship Docs Dependency	Attachments Ope	n Activities Activity History		0 /
DATE	TENDER TYPE		AMOUNT	APPLIED AMOUNT		
VE (2010	Credit Card		56.00	-56.00		12 0

Payment List

You can access the Payment List using the *Open Full List* drop-down menu, on the left side of your screen.

A Home	<i>@</i> 5	ales		E Pur
Create New		Ŧ	Sa	iles ⊧ F Pavme
Open Full List		-	1	rayine
â Ship Docs	-	*		Acco
ງ Customer R	eturns			ID
🏋 Purchase O	rders			185
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Work Order	s			182
🔦 Disassembli	ies			183
Adjustment 1101	<	*		179
				184
				177
				147

From the list you can view the payments that have been made and create new payment by clicking on the "New Payment" Button.

Payments					* 6
Account	Search Payment	Q			New Payme
ID	CUSTOMER	DATE 👻	PAYMENT METHOD	AMOUNT	ACTIONS
185	Michele Collins	1/29/2019	Cash	100.00	C 0
186	Michele Collins	1/29/2019	Cash	50.00	80
180	Adrienne Mazzone/Rebecca	1/28/2019	Cash	5.00	C 0
181	Adrienne Mazzone/Rebecca	1/28/2019	Cash	15.00	G 0
182	Allison Santana	1/28/2019	Cash	100.00	G 0
183	Christina Anderson	1/27/2019	Credit Card	500.00	80
179	Accord Corporation	1/27/2019	Cash	15.00	8 0
184	Christina Anderson	1/26/2019	Credit Card	50.00	G 0
177	Baltimore County Public Schools	12/21/2018	American Express	25,000.00	8 0
147	John Doe	9/7/2017	Visa	50,052.00	80
		< Prev 1 T	of 2 Next >		

Through the payments list you can also change the allocation to different Ship Doc and potentially create one payment to multiple ship docs and or apply a customer return to a ship doc.

Notice that in this example we have taken a payment for a Ship Doc for \$1,455.00 and we have

taken a credit of \$100.00 from a return and applied it to one Ship Doc. So we are offsetting equally to a customer return.

ayment - 1069						Save
Custome	ADN	٣		Amount 1455		
Payment Metho	Cash	*				
Dat	1/24/2019	th:				
Mem	5 (
		li				
Check / Ref	¢	li				
Check / Ref Accoun	NC Internal Bank Account	•				
Check / Ref	NC Internal Bank Account			l		
Check / Ref Accoun	NC Internal Bank Account	•	Applied 1,455.00	Unapplied 0.00		
Check / Ref Accoun	NC Internal Bank Account	▼ DATE	Applied 1,455.00 OPEN AMOUNT	Unapplied 0.00	DISCOUNT S	UNAPPLIED
Check / Ref Account	KC Internal Bank Account Kon type Ship Doc	• • DATE 12/3/2018	Applied 1,455.00 OPEN AMOUNT 1,540.00	Unapplied 0.00 APPLED AMOUNT 1.540.00	DISCOUNTS -0.00	UNAPPLIED 0.00
Check / Ref Accoun NO. 23 24	TRAN TYPE Ship Doc Ship Doc	• • DATE 12/3/2018 12/18/2018	Applied 1,435.00 OPEN AMOUNT 1,540.00 10.00	Unapplied 0.00 APPLED ANOUNT 1.540.00 10.00	ріссонт s -0.00 -0.00	UNAPPLIED 0.00 0.03
Check / Ref Account NO. 23 24 25	TRAN TYPE Ship Doc Ship Doc Ship Doc	DATE 12/3/2018 1/2/18/2018 1/1/2/019	Applied 1,455.00 OPEN AMOUNT 1,540.00 10.00 5.00	Unapplied 0.00 APPLED ANOUNT 1.540.00 1.000 5.00	риссонит я -0.09 -0.09 -0.09	UNAPPLIED 0.00 0.00 0.00

*We recommend that regular payments are taken at the Sales Order or the Ship Doc under the Payments Tab. Payment Type in Terms should not be Accounts Receivable (No Cash Payments) OR you have the "Enable "Send Payment Request" preference selected.