# Making a Payment

## Choose the Correct Payment Purpose

| PAYMENT PURPOSE | WHAT IT DOES |
|---|---|
| **Invoice payment** | Applies collected money to one or more selected posted invoices. |
| **Deposit** | Places money in the deposit wallet, where it stays held until an authorized transfer. |
| **Cash-wallet credit** | Holds general unapplied credit or an overpayment and automatically applies it to open or future invoices. |
| **Budget payment** | Places money in the budget wallet for invoice types covered by the customer's budget plan. |

*A payment saved without an invoice or wallet now lands in the cash wallet instead of disappearing from the Ledger. Always select the intended purpose before saving.*

## Pay One Invoice

1. Open the customer's **Billing** area and go to **Collections**.
2. Select the invoice the customer is paying.
3. Choose the payment or card-charge action.
4. Select the correct stored payment method.
5. Review the invoice, amount, and confirmation details.
6. Submit the charge.
7. Verify the payment on the invoice and in the Ledger.

## Pay Multiple Selected Invoices

1. Open the customer's **Collections** screen.
2. Select only the invoices the customer wants to pay.
3. Choose **Collect Payment**.
4. Review the amount against each invoice and edit it when the customer is paying a different split.
5. Select the stored payment method.
6. Submit the payment.

7. Verify that each selected invoice received the intended amount.

*The system rechecks live balances when you submit. It refuses an amount above an invoice's unpaid total, an invoice outside your selection, a duplicate line, or a total that does not match the lines. Budget-covered invoices appear unticked and zeroed with a warning. If the funds must remain held for a later purpose, use the deposit workflow instead.*

# Take a Deposit Without an Invoice

1. Open the saved payment methods in **Billing**.
2. Select **Charge Deposit** for the correct method.
3. Enter the authorized amount.
4. Submit the charge.
5. Open the Ledger and confirm the money entered the deposit wallet.

*A deposit is held and does not automatically pay an invoice. It must be transferred later by an authorized user.*

# Card Preauthorization Holds

A preauthorization holds money on a customer's card before a delivery. It is not a charge.

1. From the fuel deliveries board, select the card button on a ticket, or select tickets and choose **Preauthorize Selected**.
2. Choose the hold amount: **Full tank**, **Requested** (or **Estimated** when no customer request exists), **Requested plus** a dollar amount that starts at $50, or an exact amount on a single ticket.
3. Review the amount for each ticket and submit.
4. To change or end a hold, open the ticket. The **Already preauthorized** panel offers **Release** or **Collect as account credit**. Changing the amount releases the old hold and places a new one.

*On the credit card charges report, a hold shows its amount with "held, not charged." Holds are not included in charged totals.*

# Prompt-Pay Discounts and Receipts

- A prompt-pay discount limited to cash or check is not given when the customer pays by card.
- When a customer pays the full balance in the portal, the amount defaults to the balance less every prompt-pay discount still inside its deadline. A partial payment below the discounted amount does not take the discount.
- A discount the office removed no longer appears in the portal or on the invoice PDF.

- Payment receipt emails are sent once the customer's Ledger finishes updating, usually about a minute after the payment, so the balance shown on the receipt is final.

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Revision #1
Created 2026-11-02 13:59:11 UTC by Kozy Operations
Updated 2026-11-02 17:55:28 UTC by Kozy Operations