

Wild Apricot Cheat Sheet # 13

Recording Partial Payments

Note: Partial payments can be used to collect installments.

1 Create or open an unpaid invoice. You can add internal notes and comments to payer to document the agreed upon installment plan.

2 Open invoice and Click Record payment button on the invoice.

3 Record a partial payment for the invoice. You can add notes on the payment and comments for the payer. Save the payment.

4 Return to Invoices. The Balance due on the partially paid invoice will reflect the partial payment.

5 To record subsequent payments, return to invoice. Follow Steps 2 & 3.

6 After each payment, balance will be updated until the payment is fully paid.

Partial payments can be used to record membership fees paid in installments. It can be used for events where a deposit is given followed by one or more payments, or as a way to settle an invoice with multiple payments.