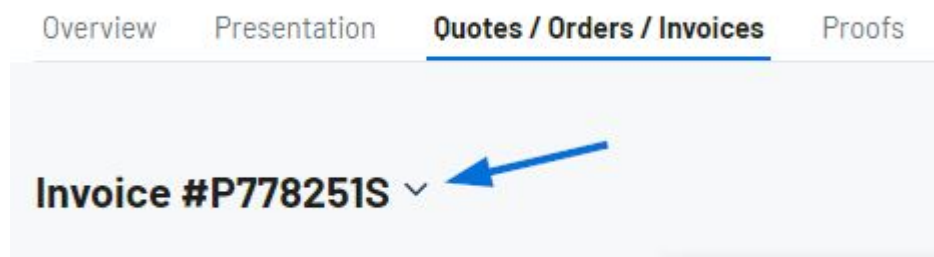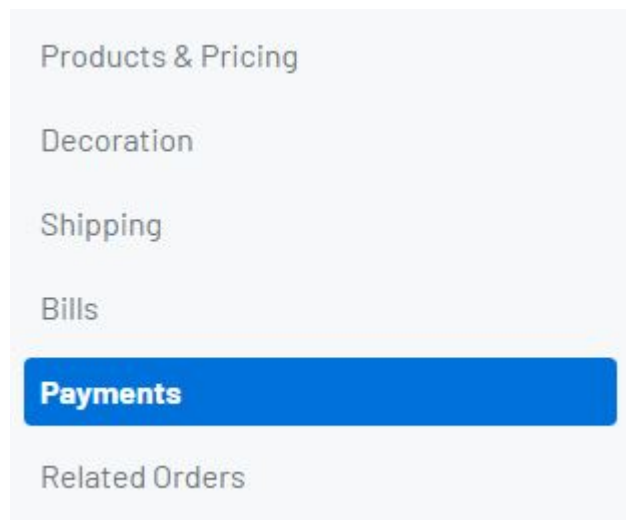# ESP+

## Record Payment

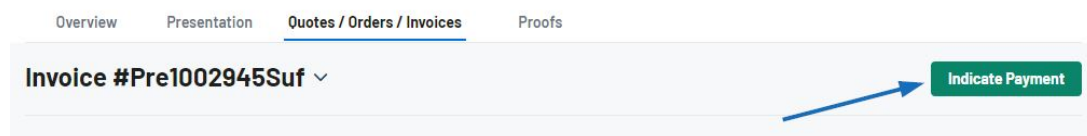Jennifer M - 2024-05-03 - Invoices & Payments

If a customer makes a payment on an order, a record of that payment can be recorded in the Quotes/Orders/Invoices tab of the Project. In this tab, use the toggle to select the Invoice.



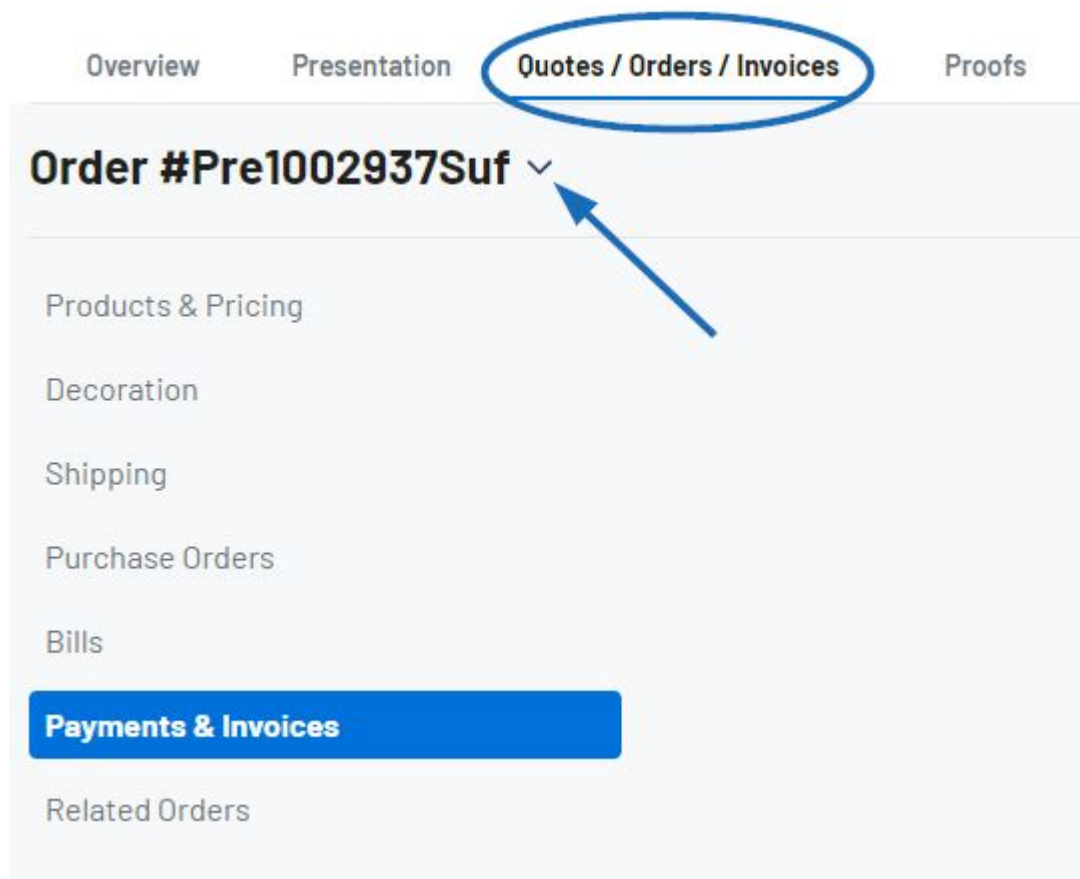Select Payments from the available options.



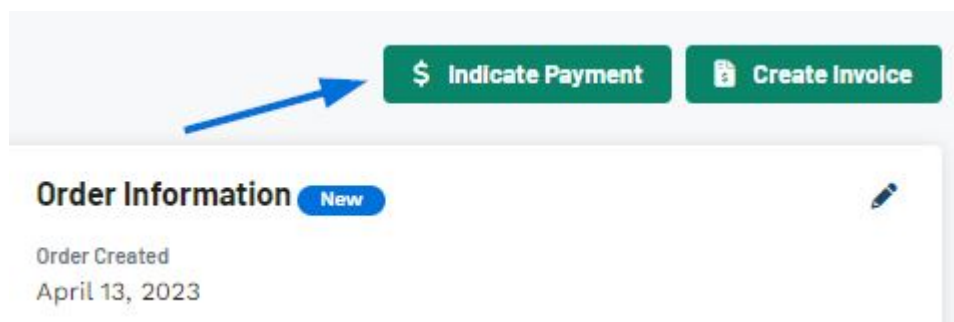Next, click on the "$ Indicate Payment" button.



**I did not create an invoice for this project. Can I still record payment information?** **(click for answer)**

Yes, payments can also be recorded in the Quotes/Orders/Invoices tab by selecting the order and then clicking on the Payments & Invoices option.
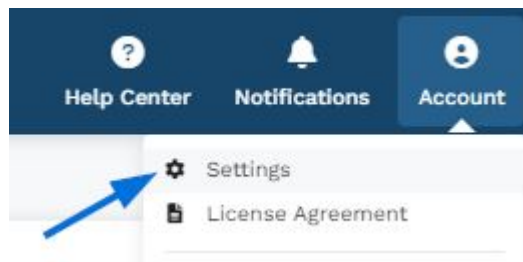
Then, click on the "$ Indicate Payment" button.



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**I don't see the "$ Indicate Payment" button. What do I do?** **(click for answer)**

If the "$ Indicate Button" is not available, there are two possible reasons.

1. The order has already been paid in full. Once the order has been paid in full, the "$ Indicate Payment" button will disappear.
2. The ability to enter payments has been disabled by an administrator within your company.
   - If you are not an administrator, you will need to contact an administrator at your company to enable this option.
   - If you are an administrator, take the following steps:
     - Click on Account from the main toolbar and then click on Settings.

In the Sales Management options, click on Order Creation Defaults.
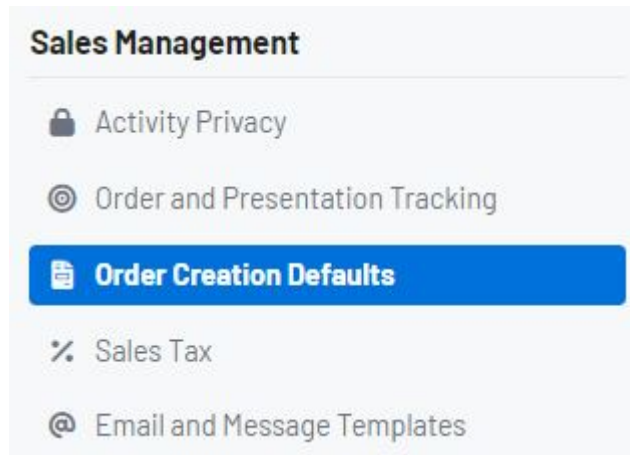


Scroll to the Order Permissions section and use the slider to indicate yes for Order Payments.



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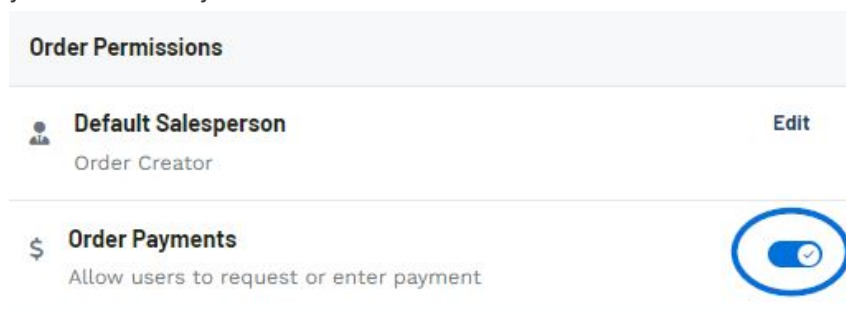
In the Indicate Payment window, enter the payment information. The required fields are Currency, Payment Amount, and Payment Method. To record a partial payment, uncheck the Paid in Full box. Additional information such as the Payment Date, Transaction Number, and Notes can also be entered in this window.

Watch how to record a payment in action!

After entering payment information, click on the Save button.

All recorded payments will be listed below the Customer and Invoice Information fields in the Payments section.
**Note:** Once the order has been paid in full, the "$ Indicate Payment" button will disappear.

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## Will entering payment information here process the payment itelf?   (click for answer)

While payments can be recorded in ESP+ for record keeping purposes, it is important to keep in mind that to process payments, you will need to employ the services of a payment processing company. All ASI Distributors can benefit from the ASI Business Savings Program, which provides members exclusive deals on a variety of business tools, including discounts on credit card processing through Promo Payment.

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## Can I edit or delete a payment record?   (click for answer)

Payments can be edited, but not deleted. To edit a payment, click on the three dot icon on the payment listing and then select "Edit"
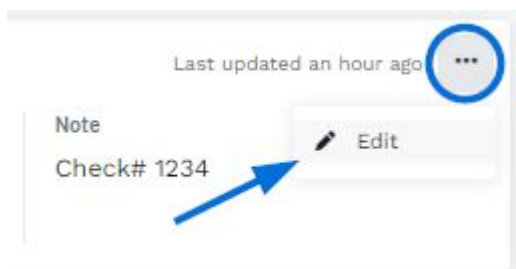


The Indicate Payment window will open and you can update the payment information.

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Related Content

- Create an Invoice