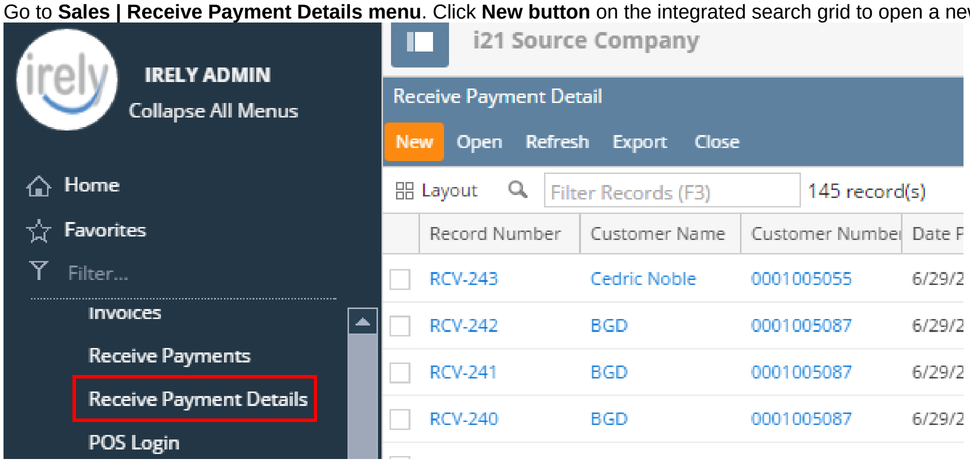
How to Create a Prepayment

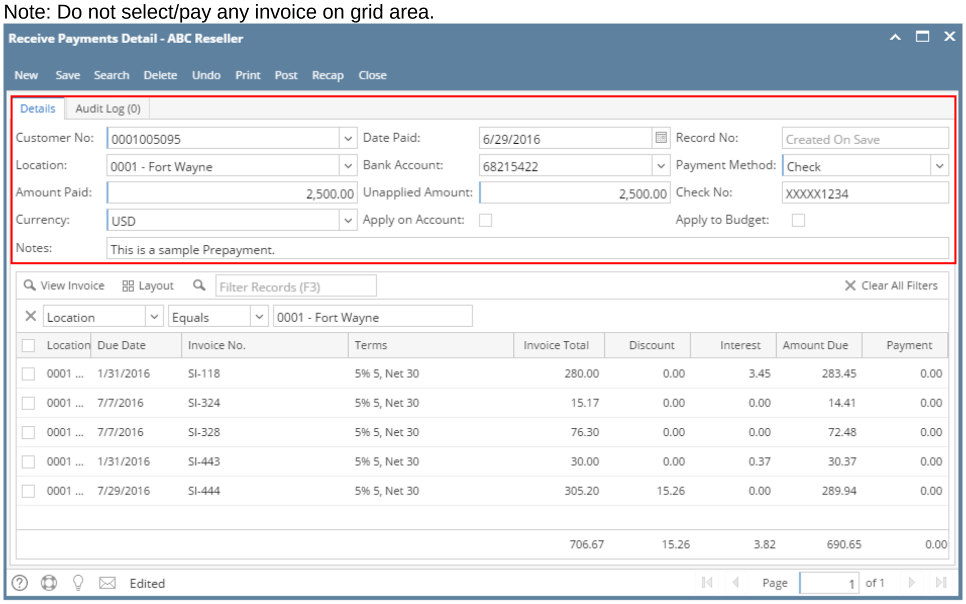
The Receive Payments Detail screen can be used to enter advanced deposits received from your customer. Below are the steps in doing this.

1. Go to **Sales | Receive Payment Details menu**. Click **New button** on the integrated search grid to open a new Receive Payments Detail screen.

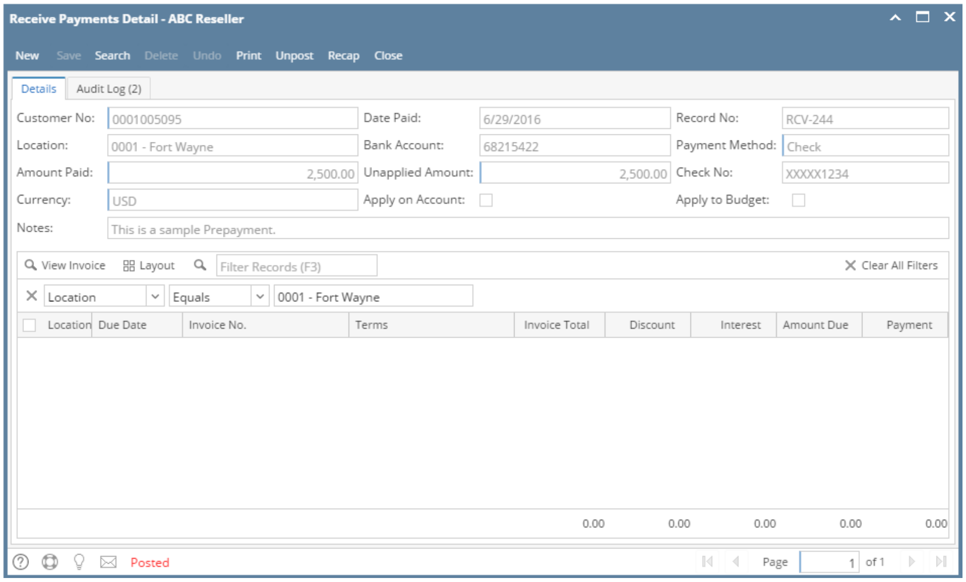


   Some of the fields, like **Location**, **Currency**, **Bank Account**, and **Date Paid** are populated by default. You can still change the value of these fields if necessary.

2. Fill out the header fields.
   a. Select the **Customer No** the prepayment is from.
   b. Select the **Location**.
   c. Select a **Payment Method**.
   d. In the **Amount Paid** field, enter the prepayment amount from the customer.
   e. Fill out other fields as needed. Refer to **Receive Payments Detail | Field Description | Header Details** to help you in filling out the fields.
   f. Note: Do not select/pay any invoice on grid area.

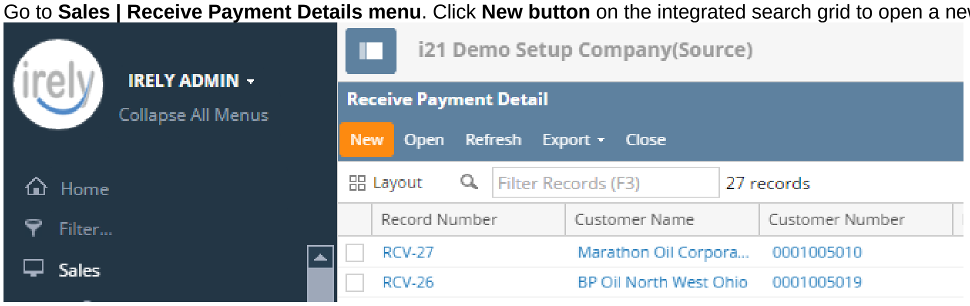


3. **Post** the transaction.
4. Click **OK** on the confirmation message.
   Here is a sample posted prepayment.

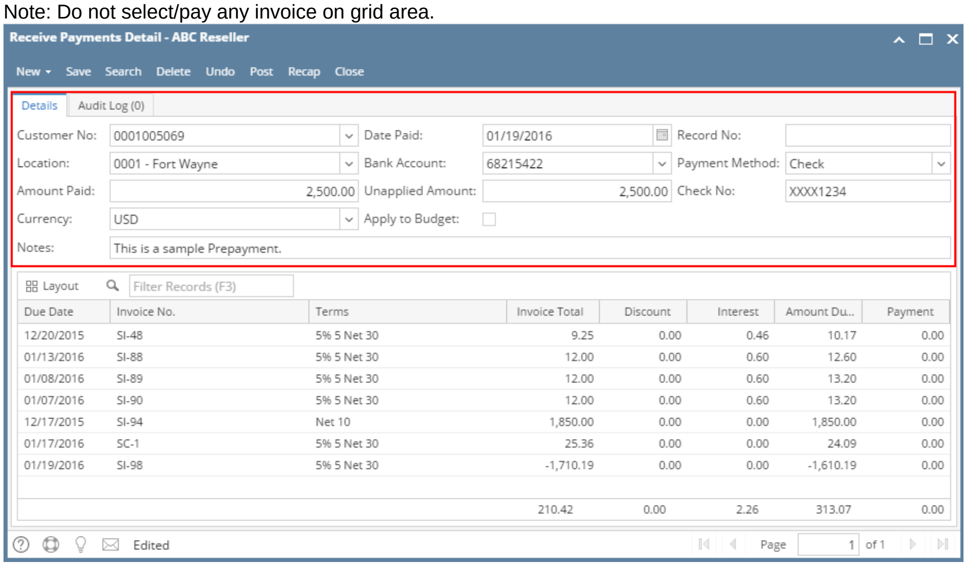


When you create another Receive Payments Detail for the customer, the prepayment will be displayed in the grid as a negative amount. You can then use it to offset or pay customer invoices (refer to How to Use Credits to Payoff Invoice).

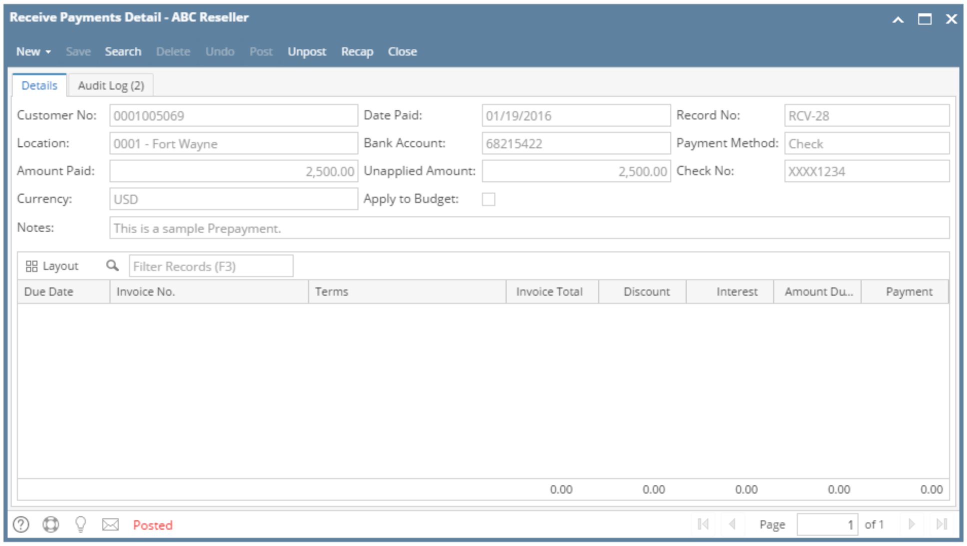
1. Go to **Sales | Receive Payment Details menu**. Click **New button** on the integrated search grid to open a new Receive Payments Detail screen.



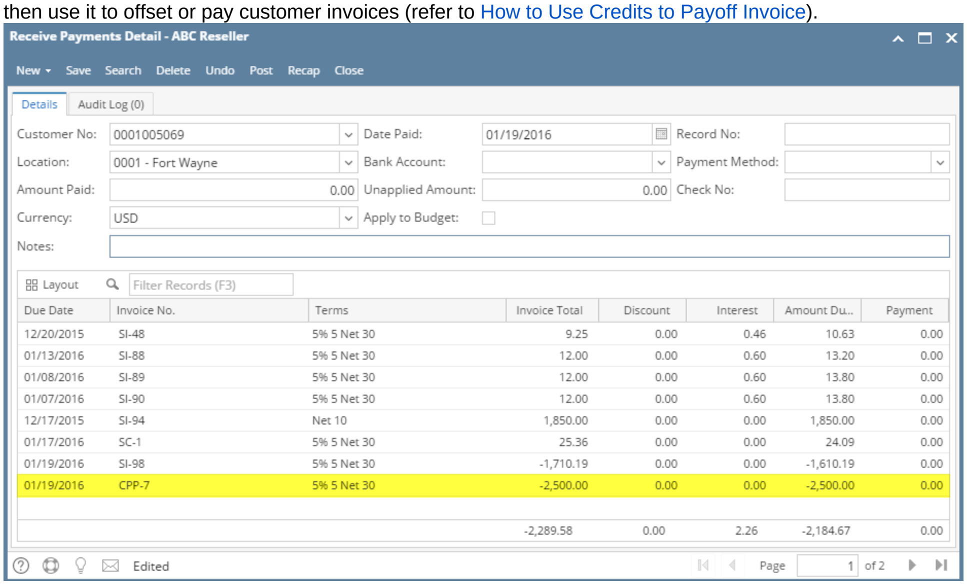
   Some of the fields, like **Location**, **Currency**, and **Date Paid** are populated by default. You can still change the value of these fields if necessary.
2. Fill out the header fields.
   a. Select the **Customer No** the prepayment is from.
   b. Select the **Bank Account**.
   c. Select a **Payment Method**.
   d. In the **Amount Paid** field, enter the prepayment amount from the customer.
   e. Fill out other fields as needed. Refer to **Receive Payments Detail | Field Description | Header Details** to help you in filling out the fields.
   f. Note: Do not select/pay any invoice on grid area.



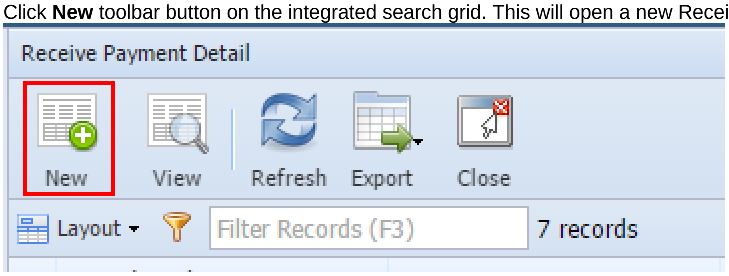
3. **Post** the transaction.
4. Click **OK** on the confirmation message.
   Here is a sample posted prepayment.



When you create another Receive Payments Detail for the customer, the prepayment will be displayed in the grid as a negative amount. You can then use it to offset or pay customer invoices (refer to How to Use Credits to Payoff Invoice).



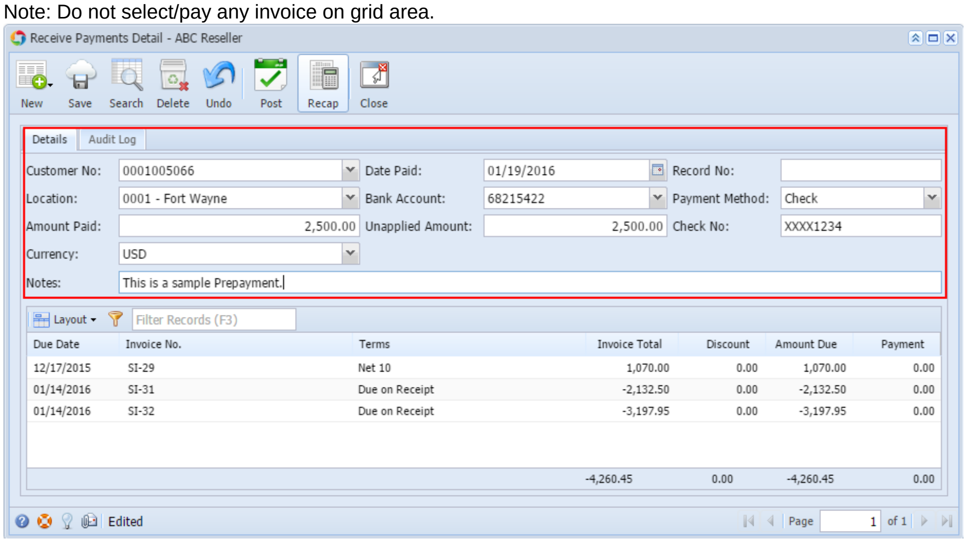
1. Go to **Sales | Receive Payment Details menu**.
2. Click **New** toolbar button on the integrated search grid. This will open a new Receive Payments Detail screen.



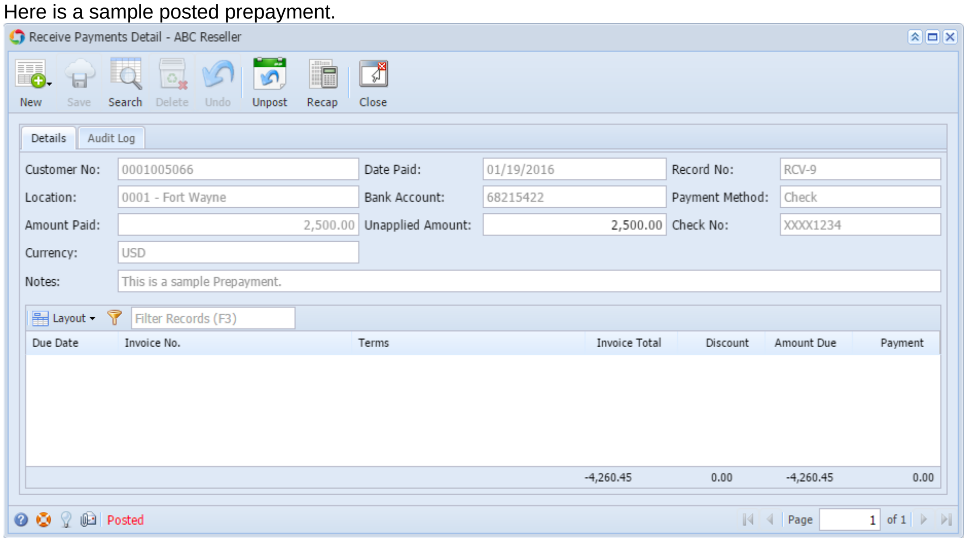
Some of the fields, like **Location**, **Currency**, and **Date Paid**, **Deposit Account** are populated by default. You can still change the value of these fields if necessary.

3. Fill out the header field.
   a. Select the **Customer No** the prepayment is from.
   b. Select the **Deposit Account**.
   c. Select a **Payment Method**.
   d. In the **Amount Paid** field, enter the prepayment amount from the customer.

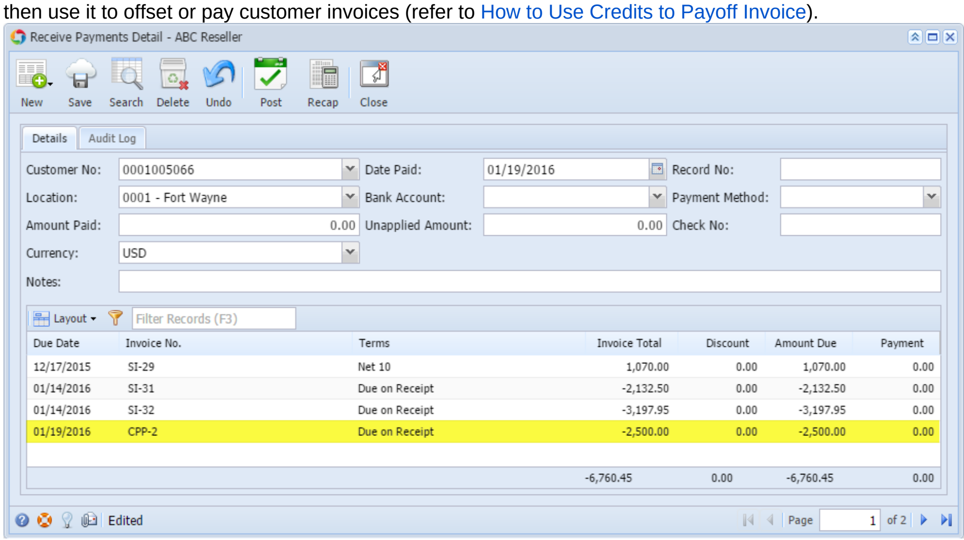
e. Fill out other fields as needed. Refer to **Receive Payments Detail | Field Description | Header Details** to help you in filling out the fields.
Note: Do not select/pay any invoice on grid area.



4. **Post** the transaction.
5. Click **OK** on the confirmation message.
Here is a sample posted prepayment.



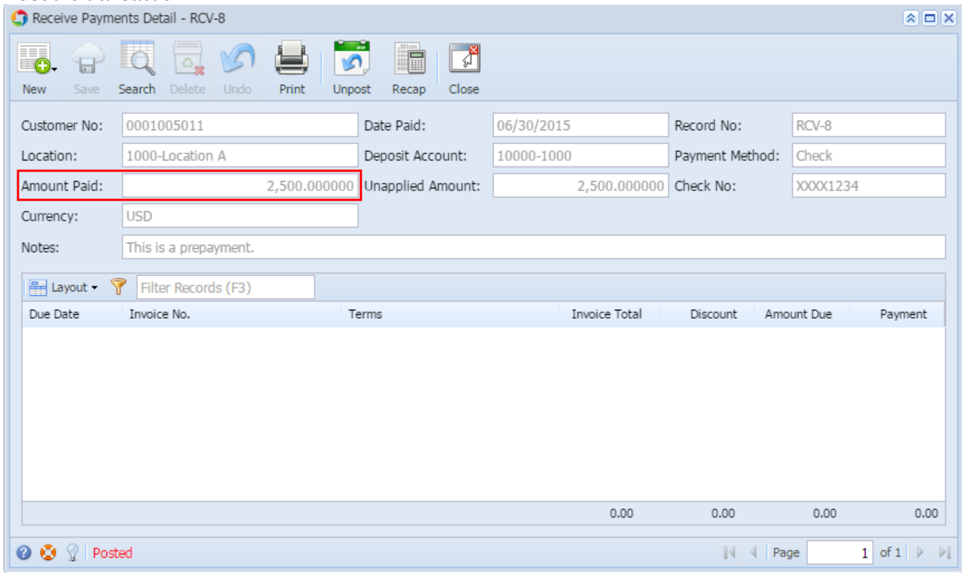
When you create another Receive Payments Detail for the customer, the prepayment will be displayed in the grid as a negative amount. You can then use it to offset or pay customer invoices (refer to How to Use Credits to Payoff Invoice).



The Receive Payments Detail screen can be used to enter advanced deposits received from your customer. Below are the steps in doing this.

1. Go to **Sales | Receive Payment Details menu**.

2. Some of the fields, like **Date Paid, Location**, **Deposit Account**, and **Currency**, are populated by default. You can still change the value of these fields if necessary. Refer to Receive Payments Detail | Field Description to help you in filling out the fields.
3. Select the **Customer No** the prepayment belongs to.
4. In the **Amount Paid** field, enter the prepayment amount from the customer.
5. Select a **Payment Method**.
6. Fill out other fields as needed.
7. **Post** the transaction.



When you create another Receive Payments Detail for the customer, the prepayment will be displayed in the grid as a negative amount. You can then use it to offset or pay customer invoices.