Add A Payment To An Existing Order

When someone pays you offline, you may need to manually record and /or process a payment for an existing order. You can do this in one of two ways: By navigating to the contact record first and making a payment, or using the Enter a Payment feature.

To record a payment from the contact record...

1. While viewing the contact record, click on the **Order** tab
2. Click the **Add Payment** button
3. Choose the invoice to pay. *Note: Only invoices with a balance due will appear in the drop-down.*
4. Enter the payment details
    1. **Amount**: Enter the payment amount. This can be a partial payment or the total balance due.
    2. **Date**: Enter the payment date (usually today's date.)
    3. **Payment Type**: Select a payment type from the drop-down. Note: Select credit card (charge now) to process the credit card payment immediately through Infusionsoft. For future billing dates use **Payment Plans.**
    4. (Optional) Enter **Notes** about this payment.
    5. (Optional) **Apply to Commissions**: This is set to Yes by default, which means the system will automatically calculate and apply referral partner commissions to this order. Choose No if the lead and/or sale partners are not eligible for commissions on this order.
5. Click the **Apply Payment** button to save the payment and apply it to the invoice.

To record a payment using the Enter a Payment feature...

1. Go to **E-Commerce** > **Orders**
2. Hover over *Orders* and click on **Enter a Payment**.
3. Enter the name of the contact and click **OK**.
4. Choose the invoice to pay. *Note: Only invoices with a balance due will appear in the drop-down.*
5. Enter the payment details.
    1. **Amount**: Enter the payment amount. This can be a partial payment or the total balance due.
    2. **Date**: Enter the payment date (usually today's date.)
    3. **Payment Type**: Select a payment type from the drop-down. Note: Select credit card (charge now) to process the credit card payment through Infusionsoft when you record the payment.
    4. (Optional) Enter **Notes** about this payment.
    5. (Optional) **Apply to Commissions**: This is set to Yes by default, which means the system will automatically calculate and apply referral partner commissions to this order. Choose No if the lead and/or sale partners are not eligible for commissions on this order.
6. Click the **Apply Payment** button to save the payment and apply it to the invoice.