Add a Wholesale Payment

Last Modified on 02/10/2020 2:26 pm MST

Once you've created a wholesale order and assembled the wholesale order, you can take payments from your customers and enter them into the system.

To process a wholesale payment, follow the steps below:

Step 1 - From the Wholesale Sales Module, select the In Process
 Orders section to view all of the wholesales orders. Select your desired sales order by double-clicking on it.



 Step 2 - From the Payments_Totals sub-tab, click the New button to add a new payment.



 Step 3 - In the pop-up window, choose "Hypur", "Cash", or "Credit Card" in the Payment Type field and enter the amount paid by the customer in the Tendered field. The Change field will be auto-calculated as the difference between the amount tendered and the value in the Paid Amount field. Then click the Save button from within the pop-up

window.

E 🕈	Home	9 6 7) –				Payment				-	• ×
Recor	New rds Creation	Save S	Save and Save and New Close - Save	Validate Cancel	Open Related Record Open Related Record	Refree	sh Reset View Settings View	Previous Next Record Record Records Navigation	Close Close			~
es Order	Customer Name: Golden Leaf Wellness					Nickname:			Total Points:	Sales Person	1:	×
Finalize Sc	1 > N	mage o image d	Dell Fl Product Qty lata 0.00	Product Nam 454.00 Blue Dream	e #3		* Strain	St	rain Type	Product Price	Expire Date	1
	ts.			\$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0	00 0 00 0 00 0 00 0 00 0 00 0	Final Payment	Date Paid: 2/10/2020 Payment Type:	×	Refund Refund Amount: Memo:		\$0.00	
User:	KlerSupport		ក្ដី Total Due:	\$0.	00		Tendered:		\$0.00 Chang	e:	\$0.00	

 Step 4 - You will see that your payment has been added to the Payments_Totals sub-tab. As long as the amount in the Total Due field equals zero, you have completed the payment. If not, you need to add additional payments until the Total Due value equals zero.

9	oportur	nity Info 🛛 🗔	Sales Scan Pr	roduct	Payments Totals Quick Sale	s									
То	Total Paid:						\$44.91 🗘 Total Due:			\$0.00					
	 S Payments * X Hypur Payment Hypur Refund B - Update Action B - 2 														
		Payment Ty	pe	▲ Fee	Tendered	Paid Total	Change	Memo	Total Due	Create	Date Paid	Transa	Ref	Employ	
	► 1	Cash		\$0.00	\$50.00	\$44.91	\$5.09		\$0.00	Admini	6/1/2018		\$0.00		
	*														
	Use these fields to make this opportunity tax exempt. This is temporary and will only effect this opportunity.														
	Exempt from Tax 1 Exempt from Tax 2														

• Step 5 - Click the Save or Save and Close button in the top navigation bar.



You're done! You've added your customer's payment to the wholesale sales order!

