SedonaWeb 2.0 - How to Pay Invoices

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Customers have the option to either pay a single invoice or pay all open invoices when using SedonaWeb 2.0. This document will go over how to do each transaction.

Overview

After a customer logs into their online account, the home page will show if there is a current balance due on the account. Click on Invoices tab to see what invoices are outstanding and ready for payment.



Invoices Tab

In the Open Invoices page, there are two options to pay the open invoices. Pay Open Invoices Button or Pay It Button – either button will open the Pay Open Invoices page where all or one of the open invoices can be paid.

Open Invoices											Pay Open Invoice
											Paid Invoices
Drag a column header and	I drop it here to group by that field										
Invoice #	E Date	1	Site	Description	1	Amount	1	Net Due	1	Payment	1
393294	05/24/22		Site email populated	Service Call		\$65.25		\$65.25		Pay It	
393314	05/26/22		Site email populated	Service Call		\$75.00		\$75.00		Pay It	
399375	09/21/22		Site email populated	FC		\$3.88		\$3.88		Pay It	
425133	01/01/23		Site email populated	Recurring		\$15.00		\$15.00		Pay It	
425134	01/01/23		Site email added	Recurring		\$15.00		\$15.00		Pay It	
475916	05/25/23		Smokey Treats BBQ - Smoke House	Service Call		\$10.78		\$10.78		Pay It	

Pay Open Invoices Page

How to pay one invoice at a time

1. Click on the Select Payment Methods dropdown to select the type of payment (Credit Card or Bank) and what method is on file for the customer (Credit Card or Bank Account)

irag a column header and	d drop it here to group by that field										
Invoice #	E Date	1	Site	Description	: A	Amount	1	Net Due	1	Amt to Apply	•
393294	05/24/22		Site email populated	Service Call	\$	\$65.25		\$65.25		0	
393314	05/26/22		Site email populated	Service Call	\$	\$75.00		\$75.00		0	•
399375	09/21/22		Site email populated	FC	\$	3.88		\$3.88		0	
425133	01/01/23		Site email populated	Recurring	\$	\$15.00		\$15.00		0	
425134	01/01/23		Site email added	Recurring	s	\$15.00		\$15.00		0	
475916	05/25/23		Smokey Treats BBQ - Smoke House	Service Call	s	\$10.78		\$10.78		0	•
										Total:\$0	•

2. Once those are selected, click on the Invoice to pay checkbox and fill in the amount to pay on that invoice. The total will show in the yellow box next to the payment method. Click on the button to pay the invoice.

ay Open Invo	lices					Select Payment Metho		Pay \$15				
rag a column header and	d drop it here to group by that field											
nvoice #	E Date	1	Site	Description	1	Amount	1	Net Due	1	Amt to Apply		
193294	05/24/22		Site email populated	Service Call		\$65.25		\$65.25		0		
193314	05/26/22		Site email populated	Service Call		\$75.00		\$75.00		0	0	
199375	09/21/22		Site email populated	FC		\$3.88		\$3.88		0	0	
125133	01/01/23		Site email populated	Recurring		\$15.00		\$15.00		15		
25134	01/01/23		Site email added	Recurring		\$15.00		\$15.00		0	0	
75916	05/25/23		Smokey Treats BBQ - Smoke House	Service Call		\$10.78		\$10.78		0	0	
										Total:\$15		

3. Once payment is made without errors, will show Success in a Green Box in right upper corner and will also say Payment Successful! Now can click on Print or Close to get out of the window.

BCLD									Success Payment Successfully Processed.
# Home		Invoices	Payments -	& Service -	Documents	Settings -	C Logout		
Payment Typ Payment Me Last Four Phone Nami Email Addre Transaction Amount Pain Transaction					Pa	yment Suco	cessful!		
Payment Typ	м	Credit Card				· ·			
Payment Me	rthod	Cash							
Last Four		0026							
Phone Numi	ber	2165553333							
Email Addre	55	rastwo@gmail.cr	om						
Transaction	Date	06/12/2023							
Amount Pair		15.00							
Transaction	id .	1769							
						PHI Co			

How to pay multiple invoices at the same time

1. Click on the Select Payment Methods dropdown to select the type of payment (Credit Card or Bank) and what method is on file for the customer (Credit Card or Bank Account)

ay Open Invo	bices			Select Payment	Select Payment Method Credit Card • VISA - 0026 • Pay							
irag a column header an	d drop it here to group by that field											
Invoice #	: Date	; Site	Description	: Amount	: Net Due	Amt to Apply	-					
393294	05/24/22	Site email populated	Service Call	\$65.25	\$65.25	65.25	2					
393314	05/26/22	Site email populated	Service Call	\$75.00	\$75.00	75	2					
399375	09/21/22	Site email populated	FC	\$3.88	\$3.88	3.88	2					
425134	01/01/23	Site email added	Recurring	\$15.00	\$15.00	15	2					
\$75916	05/25/23	Smokey Treats BBQ - Sr	noke House Service Call	\$10.78	\$10.78	10.78	2					
						Total:\$169.91	-					

2. Once those are selected, click on the Invoice to pay checkboxes that are to be paid and fill in the amount to pay on each invoice. The total will show in the yellow box next to the payment method. Click on the button to pay the invoice once ready.

BCLD		Success × Payment Successfully Processed.
	AR 🗈 Invoices 🚍 Payments - 🗡 Service - 🖉 Documents 🌣 Settings - 🕞 Lopout	
	Payment Successful!	
Payment Type	Credit Card	
Payment Method	Cash	
Last Four	0026	
Phone Number	2165553333	
Email Address	rastwo@gmail.com	
Transaction Date	06/12/2023	
Amount Paid	169.91	
TransactionId	1770	
	Print Close	

3. Once payment is made without errors, will show Success in a Green Box in the right upper corner and will also say Payment Successful! Now can click on Print or Close to get out of the window.

Open Invoices Page after payment(s) made

Open Invoices												Pa	ay Open Invoic
Drag a column header and dro	on it have to	moun by that field										OP	ald Invoices
Invoice #		Date Date	I	Site	1	Description	1	Amount	I	Net Due	1	Payment	1
**0 **	10	items per page										No items to di	splay O

Once all invoices are paid, there will be no more listed showing open for payment