Invoices - Payment History

This article applies to:

Display completed payments or processed refunds on an invoice so your clients can see their payment history.

Payment Display

1. Navigate to an invoice in the Money tab or Money navigation page

2. Click any existing Invoice card

3. Scroll down to "Payments for this invoice #"

4. Click "Add Payment"
5. By default the full invoice amount will be displayed. You can adjust the payment amount if needed.

6. Select the "Payment type".

7. Click "Add".

8. Once the payment has been added, scroll back to "Payments for this invoice #" to view the payment.
9. Navigate to an invoice in the Money tab of the Contact card

10. Click on the payment that needs to be refunded

11. Click "Refund" and once complete go to the Invoice for that Payment

12. Scroll to "Payments for this invoice #" and you will see the refund displayed