Add a payment to an existing order

This article applies to:

Max Classic

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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.

Record a payment in 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.
        1. Credit Card (charge now): This is the only payment type that actually charges a credit card on file. Selecting this option will process the credit card payment immediately through Max Classic.
        2. Credit Card: Manually adds a payment, but does not charge a card on file. This may be used when a card was charged with a POS system and you just want to manually record the payment on the order.
        3. Check: Records the payment type as "Check"
        4. Cash: Records the payment type as "Cash"
        5. Money Order: Records the payment type as "Money Order"
        6. Adjustment: Records the payment type as an "Adjustment"
        7. 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.

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 Max Classic when you record the payment.
    1. Credit Card (charge now): This is the only payment type that actually charges a credit card on file.
    2. Credit Card: Manually adds a payment, but does not charge a card on file. This may be used when a card was charged with a POS system and you just want to manually record the payment on the order.
    3. Check: Records the payment type as "Check"
    4. Cash: Records the payment type as "Cash"
    5. Money Order: Records the payment type as "Money Order"
    6. Adjustment: Records the payment type as an "Adjustment"
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.