Receive Payment Questions

Q: What is the max limit of invoices that can be paid at a time?
A: There is no limit on the number of invoices that can be paid at a single time, pay 50, 250 or 500.

Q: How do I delete a payment done through Receive Payment?
A: Payments can be deleted by going to the Sales Order and the Deposits/Payments window.

Q: Can you change a client's taxability within Receive Payments?
A: A client's taxability can only be changed from the Contact page or from the Sales Order page.

Q: For Receive Payments, do SOs have to be invoiced or can it be a Sales Order in pending or open?
A: Sales Orders must be in invoice status with a balance due to show in the Receive Payments list.

Q: I have a client that pays multiple invoices but takes a discount or reduce on one invoice.
A: For the invoice with a discount, process paying multiple invoices and partial pay the invoice with a discount by adjusting the amount applied to the invoice. Once this is done, apply a second payment to the specific invoice that has the discount with your internal specified adjustment or payment type for the balance remaining due to the discount.

Q: Will there be a Receipts General Journal Entry available in V2 as there currently is in V1?
A: There will be a Journal Entry for receipts available as we move Finance into Syncore (V2).

Q: For Receive Payments, will there be an option to include the individual Check # for each payment?
A: The check number entered in the Payment description in Receive payments will be applied/added to all the invoices selected in the batch.

Q: How do I apply an ACH payment if some of the invoices are not listed?
A: If the invoice is not shown in the Receive Payments feature, then the payment can be applied by going to the Sales Order page.

Q: Are there any options to run the receipts journal to breakdown by type of payment? Example, credit card, ACH, check.
A: The Client Receipts report in Syncore (V2) can be grouped by payment type by dragging the column header to the top of the report.

Consolidate Invoice Questions

Q: I do not see the consolidated invoices tab...is that coming soon or do we need to do something?
A: This is not yet available but is coming soon! Keep an eye out for it. You don't need to do anything; it will be available to you automatically.

Q: Will we be able to post a payment to a Consolidated Invoice?
A: The consolidated invoices will soon be made available in the Receive Payments where payments can be applied to them.

Q: Will we be able to include split ship orders in the Consolidated Invoice?
A: Yes, invoices from split-shipment orders can be included in a consolidated invoice.

Q: Can we include the single Consolidated Invoice and the individual invoices? For example, 1 Consolidated Invoice plus 20 individual invoices?
A: It is optional to include the individual invoices in the consolidated invoice email. In our research, we did hear the feedback that clients sometimes ask for individual invoices too. So, there's an option to include individual invoices along with the consolidated invoice, if needed.

Q: I wanted to clarify if we can send a Consolidated Invoice across multiple clients?
A: Yes, you can select invoices from multiple clients and consolidate them into one consolidated invoice

Q: Is a consolidated Invoice similar to a statement?
A: The new consolidated invoice is a regular invoice that has the details of multiple orders along with terms, invoice date and billing address set on it.