



Customer Payments Training

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Company: _____ Signed: _____

Name: _____ Position: _____ Date: _____

Trainee to complete: Please tick

1. [] **Preferences**
Do you know where to set the Payment preferences?
2. [] **Accounts**
Why are these typically set as the current defaults?
3. [] **Statement Messages**
Can you add your own messages for 30, 60, 90 days overdue?
4. [] **Grouping**
Why would group payments from POS?
5. [] **A/R Grouping**
Why would group payments from Customers/Jobs?
6. [] **Statement Grouping**
Why would group jobs on statements?
7. [] **A/R Report**
Can you open the Accounts Recievable report?
8. [] **Column Name Changing**
Do you know how to alter the name of the column within the list?
9. [] **Zoom In**
Can you drill into the transactions?
- 10.[] **A/R Notes**
Can you make a "To Do" from the notes?
- 11.[] **Reminders**
Can you see that "To Do" in your reminders?
- 12.[] **Notes for A/R**
Can you open the Accounts Receivable Notes Report?
- 13.[] **Customer Payments**
Do you know how to open the Customer Payment form?
- 14.[] **Applying Payments**
Do you know how to open the Customer Payment form?
- 15.[] **Part Payments**
Do you understand how to adjust the payment amount within the payment window?

- 16.[] **To Be Deposited**
Do you understand why you would use this function?
- 17.[] **Refund Payments**
How do you apply a Refund to an Invoice?
- 18.[] **Over Paying an Invoice**
How do you pay more against an Invoice?
- 19.[] **Payment Discount**
How do you apply a discount to an invoice from the payment form?
- 20.[] **Payment from an Invoice**
How do you pay directly from an Invoice?
- 21.[] **Prepayments**
Do you know what a Customer Prepayment is?
- 22.[] **Payment List**
Can you open the Payment list?
- 23.[] **Double Click Lines**
Can you drill into any payment from the list?
- 24.[] **Receive Bulk Payments**
Can you make a payment based on a suggestion?
- 25.[] **Statements**
Can you Print a Statement?
- 26.[] **Options**
In the statement screen where are your options?
- 27.[] **Statement Templates**
Where can you find all the available templates?
- 28.[] **Changing Templates**
Why should you not change any of these?
- 29.[] **Set Default**
How do you select a default statement template?

Notes:

Are there any aspects in this area that more training would be useful?
