**Manage Customer Invoices & Payments in moonstride**

*All invoicing and payment processes for bookings are streamlined in the Invoices & Payments tab. Easily create, send, allocate, track, and report on every customer invoice and payment from a single, central screen.*

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**1. Manage Customer Invoice & Customer Payment**

Once a booking is confirmed, select the **Invoices & Payments** tab on the booking screen to manage all related invoice and payment records.

**Navigation:** CRM → Bookings → Booking List → Click on booking → Invoices & Payments tab

[Insert screenshot here: Full Invoices & Payments tab view with main navigation highlighted]

This area includes these tabs:

* Invoice
* Credit Note
* Payment Record (default)
* Payment Management

**2. Manage Invoice**

Create, send, download, reissue, or update invoices—handle everything, including both full and partial invoicing.

**Add Invoice**

To add an invoice:

* Select **Add Invoice** within the Invoices & Payments → Invoice section.

[Insert screenshot here: Invoice List screen with Add Invoice button highlighted]

In the add/edit invoice form, specify:

* Issue By
* Issue To
* Invoice Date / Due Date
* Full Amount / Deposit Amount
* Invoice Reference
* Pricing Structure (choose what’s shown and layout)
* Hide Tax Rate (optional)
* Branding (Company, Sell Channel, or Agent)
* Additional Description

[Insert screenshot here: Add Invoice form with all major fields labelled]

Select the components/services to include, then click **Save**.

[Insert screenshot here: Invoice component selection and Save button]

Once saved, invoices are listed and can be managed using actions like Edit, View, Mark as Posted, Payment, Credit Note, Download, and Allocate Payment.

[Insert screenshot here: Invoice actions dropdown revealed]

**3. Credit Note**

Record credit notes to account for adjustments, overpayments, or refunds.

* Use the Credit Note tab to issue, apply, and manage credit notes linked to customers, agents, specific bookings or invoices.
* Handle both refundable and adjustable credit notes, and settle payments or record customer refunds efficiently.

**4. Payment Record**

Monitor all payments received for a booking, see payment status, and allocate funds to invoices or payment plans.

The default view under Invoices & Payments.

[Insert screenshot here: Payment Record tab opened]

The top shows paid amount, balance due, due date, and total receivable.

**Add Payment Record**

* Fill in Payment Type (e.g., Card, Cash, Cheque, BACS)
* Amount
* Use Deposit or Balance
* Paid By
* Note and Payment Date/Time
* Notification options to payer/customer

[Insert screenshot here: Add Payment Record popup or section]

Click **Add** to save. Each payment shows in **Payment History** with complete details.

[Insert screenshot here: Payment History section in the Payment Record tab]

**Request Card Payment**

* If using Card, choose Card Type and Payment Gateway
* Enter amount, then click **Request Card Payment** to generate/send a payment link to the customer

[Insert screenshot here: Payment Details showing card options and Request Card Payment button]

Payment emails show relevant due dates and match main service and pricing summaries.

[Insert screenshot here: Deposit and balance due reflected in email and dashboard]

Notifications can be customised for the customer, agent, or contact person as needed.

**Payment Record Actions**

For each payment entry, available actions include:

* **Add Credit Card Fees** (choose card type and fee, fixed or %) [Insert screenshot here: Add Credit Card Fees screen]
* **Refund** (specify type, amount, and process) [Insert screenshot here: Refund Payment screen]
* **Move Payment** (transfer payment to another booking) [Insert screenshot here: Move Payment screen]
* **View Invoice Details** (see linked invoice info) [Insert screenshot here: Invoice Details table for a payment]
* **Map Invoice** (allocate payment to an invoice) [Insert screenshot here: Map Invoice option selected]
* **Adjust Allocation** (un-allocate amount for reallocation)
* **Send Payment Notification** (customisable email) [Insert screenshot here: Payment Notification Email creation screen]
* **Delete Payment**
* **Allocate to Payment Plan**

[Insert screenshot here: Payment History with action dropdown expanded]

**5. Payment Management (Payment Plan)**

If enabled, set up flexible payment plans for bookings and passengers:

* Go to the **Payment Management** tab to define deposit and instalment dates/amounts by organiser or by passenger.
* Configure deposits (fixed/percentage), instals (dynamic or fixed dates); import or export your plan as required.
* Click “**Generate Plan**” to finalise the payment schedule.

[Insert screenshot here: Payment Management tab, payment plan configuration and Generate Plan button]

From here, you can:

* **Delete instalments**
* **Share payment links**
* **Proceed to payment**
* **Report or import/export passenger payments**

[Insert screenshot here: Payment Plan management screen with action buttons]

**6. See Also**

* [Manage Documentation](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Credit Notes](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Group Booking Payment Plans](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Booking Communication Templates](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

The Invoices & Payments area in moonstride provides a full toolkit for managing every customer invoice and payment against bookings. From multi-invoice support, mixed payment types, refunds, allocations, notifications, and tailored payment plans—all financial actions are logged, secure, and ready for audit. Review each tab with the matching screenshot to familiarise yourself with all available workflows.