**Payment Management in moonstride (Bookings)**

*Set up flexible deposit and payment plans tailored to each booking, group, or individual passenger. Automate reminders, support partial payments, and keep everything transparent from booking to completion.*

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**1. Payment Management Overview**

With Payment Management, you can define a unique payment schedule (plan) for each booking. Set deposit amounts, schedule instalment due dates, and decide if payments are made by the organiser or by each passenger individually.

[Insert screenshot here: Full Payment Management tab in Invoices & Payments, highlighting "Payment Plan" button and Payment By selection.]

This feature is essential for group bookings and is also available for certain tours.

**2. Configuring a Payment Plan**

* Go to the **Invoices & Payments** tab within your booking.
* Select **Payment Management** and click **Payment Plan** (top right).

[Insert screenshot here: Payment Management screen showing Payment Plan module]

You’ll see summary details for the booking’s deposit and balance due dates, and can choose who will pay:

**Payment By (Organiser vs. Passenger)**

* Select **Organiser** if the group leader is paying for everyone; select **Passenger** if each traveller pays their share.
* Under **Amount Per Passenger**, choose how payments are divided:
  + As per payment plan rule
  + Same as allocated services
  + Equally divide booking amount among selected passengers
  + Set fixed amount for selected passengers

[Insert screenshot here: Payment By selection and Amount Per Passenger radio buttons and options]

**Configure deposit/payment details** as preferred, then click **Generate Plan** to create your schedule.

[Insert screenshot here: Generate Plan button and preview of generated schedule]

Each row displays:

* Traveller name (organiser or passenger)
* Deposit and/or instalment due dates
* Amounts due, paid, and any outstanding balance
* Payment status (Unpaid, Partial Paid, Paid)

You can edit any instalment by clicking the pencil/edit icon in the row, delete an instalment, or add more lines as required.

[Insert screenshot here: Instalments with edit and delete icons; Share Payment Link and Proceed to Payment buttons]

**3. Bulk Instalment Actions & Import/Export**

* **Bulk Instalment:** Set up or overwrite instalment plans for multiple passengers at once using the **Bulk Instalment** button at the top. Fill in passenger selection, start date, tenure, and amounts, then click **Add** or **Overwrite** as appropriate.

[Insert screenshot here: Bulk Instalment popup with required fields and action buttons]

* **More Options:** Use the **More** menu to import/export payment plans or generate payment reports for analysis and record-keeping.

[Insert screenshot here: More menu with Import/Export options]

**4. Making Payment as per Payment Plan**

Payments can be made in amounts greater or less than the deposit or instalment amount. When a passenger or organiser pays:

* Payments above the expected amount mark current and prior milestones as "Paid" or "Partial Paid" and carry excess to upcoming instalments.
* Both back-office users and customers via portal can update amounts at payment time.
* Example: If the deposit is 300 and the passenger pays 500, the deposit is paid in full and the remaining 200 reduces the next instalment as "Partial Paid."

[Insert screenshot here: Payment entry with overpayment reflected in multiple instalments and Partial Paid status]

You can send payment links to organiser or each passenger, or proceed to payment directly from the plan interface.

**5. See Also**

* [Manage Customer Invoice & Payments (FIT Bookings)](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Creating a New Group Booking](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Booking Communications and Task Workflow](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Exporting Payment Reports](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

With Payment Management in moonstride, you can:

* Set up and automate flexible payment schedules for groups or individuals
* Allow organisers or passengers to pay directly and securely
* Easily edit, import, or export instalment plans as bookings evolve