Receive a Customer Payment

How to Receive a Customer Payment in Muhasib ERP

Overview

This guide will help you record money received from a customer and allocate it correctly.

Muhasib records the receipt and updates customer and account balances according to allocation.

Who can do this

You need access to Customer Payment plus customer, account, payment-method, and transaction.

Before you start

Confirm customer, amount, date, payment method/account, reference, currency, and invoices to settle.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Sales & Customers → Customer Payment.

Receive a Customer Payment

Step 1: Start a new customer payment

Step 2: Select the customer and receipt date

Step 3: Enter payment method, receiving account, amount, and reference

Step 4: Allocate the receipt to eligible transactions when required

Allocate the receipt to allowed transactions when required.

Step 5: Confirm allocated plus unallocated value equals the receipt

Step 6: Save once and issue the approved receipt

Check your work

Compare and Confirm the receipt, customer ledger, invoice balances, receiving account, and printed document.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Search by reference before retrying a timed-out save.
- Do not allocate more than the available receipt or allowed balance.

Related guides

- Allocate or Update Customer Payment Transactions
- Receive Customer Payments in Bulk
- Pay or Refund a Customer

What to do next

> **Allocate or Update Customer Payment Transactions**.

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