

Make an Account Payment

You can make a payment to your accountant without an invoice. These payments are called account payments, but you may hear them referred to as retainers, pre-payments, or payments without an invoice. Typically, account payments would be made when you want to pre-pay for a service, or if you want to make a payment towards your account but would prefer your accountant decide where that payment is allocated. This section will show you how to make an account payment.

- 1. Navigate to the *Billing* section using the navigation bar.**



Home



To-do



Files



Billing

2. Click *Make a payment*.

3. Deselect any outstanding invoices.

- It is usually advisable to make your payment towards an outstanding invoice.

Make a Payment

Outstanding Invoices

Current account balance: \$908.05

<input type="checkbox"/>	<div>\$443.05 Balance</div> <div>Due May 31, 2022 Invoice #0043</div>	<div>\$0.00</div>
<input type="checkbox"/>	<div>\$155.00 Balance</div> <div>Due Jun 27, 2022 Invoice #0048</div>	<div>\$0.00</div>
<input type="checkbox"/>	<div>\$155.00 Balance</div> <div>Due Jul 1, 2022 Invoice #0049</div>	<div>\$0.00</div>
<input checked="" type="checkbox"/>	<div>\$155.00 Balance</div> <div>Due Jan 31, 2023 Invoice #0017</div>	<div>\$0.00</div>

Account Payment

\$0.00

Total Payment

\$0.00

Continue

Cancel

4. In the *Account Payment* box, enter the amount you wish to pay towards your account.

Make a Payment

Outstanding Invoices

Current account balance: \$908.05

☐

\$443.05 Balance

Due May 31, 2022 Invoice #0043

\$0.00

☐

\$155.00 Balance

Due Jun 27, 2022 Invoice #0048

\$0.00

☐

\$155.00 Balance

Due Jul 1, 2022 Invoice #0049

\$0.00

☐

\$155.00 Balance

Due Jan 31, 2023 Invoice #0017

\$0.00

Account Payment

\$150.00

Total Payment

\$150.00

Continue

Cancel

5. Click *Continue*.

6. Select a payment method to make the payment with.

7. Click *Continue*.

Make a Payment

Total Payment

\$150.00

Payment date*

07/07/2022

Select a payment method

★

Visa *4242

Use another payment method

Back

Continue

Cancel

Verify and Confirm Payment

×

Total payment amount:

\$150.00

Payment date:

Payment method:

Jul 7, 2022

Visa *4242

By clicking Confirm and pay, you authorize Arnold Accounting Assistants to schedule and initiate the payment listed above.

Back

Confirm and pay

Cancel

9. Click *Done* to return to the portal.

Billing

\$155.00

Outstanding balance

Invoices

Payment history

Credits

\$155.00

0017

Due Jan 31, 2023

[View paid invoices](#)

[Make a payment](#)