

Add and Apply Channel Invoice Payments

04/30/2025 3:09 pm CDT

Overview

Sellercloud's [Channel Invoice workflow](#) allows you to generate and manage channel invoices based on the shipped orders for a specified date range. Effortlessly reconcile the channel's invoices against Sellercloud data and **Add** and **Apply** the corresponding **channel payments**.

Before you can add and apply channel invoice payment, [you must add a channel customer](#) and [create a channel invoice](#).

Add Channel Invoice Payment

To Add a Channel Payment in Sellercloud:

1. Navigate to **Customers** > **Channel Customers** > click on the channel customer's **Display Name**.
2. Go to **Payments** to display a list of all added payments, including both ones that have been applied to invoices, and the ones that have not. The **Open Balance** column will reflect the payment available amount.

The screenshot shows the Sellercloud interface for adding a payment. The navigation menu includes Home, Inventory, Customers, Orders, Reports, Employees, Settings, My Account, Admin Settings, and Product. The 'Customers' menu is expanded, showing options like 'Add New Customer', 'Saved Searches', 'User Groups', 'Import Customers', 'Import Store Coupons/Gift Cards', 'Top Customers', and 'Channel Customers'. The 'Channel Customers' option is selected. The breadcrumb trail is 'Home > Customers List > Channel Customers >'. The left sidebar has 'Payments' selected. The main form fields include: Company (Houzz), Channel (Houzz), Date From (calendar icon), Date To (calendar icon), Payment Method (dropdown menu set to ALL), Reference # (text input), and Payment Amount (text input). A green 'Search' button is below the form. Below the form is a table with columns: Payment ID, Payment Date, Payment Method, Reference #, Amount, and Open Balance. The table contains one row with Payment ID 24, Payment Date 3/18/2019, Payment Method Cash, Reference # 12345, Amount \$100.00, and Open Balance \$100.00. A blue arrow points to the 'Add Payment' button, and another blue arrow points to the 'Open Balance' column header.

3. Click **Add Payment** and complete the following fields:

- **Payment Date** – Mandatory field. Record a date for the payment.
- **Payment Amount** – Enter the payment amount.
- **Payment Method** – Mandatory field. Choose a method from the dropdown menu.
- **Reference #** – Enter an optional reference to the payment method – e.g. the check number if paid by

check, etc.

General Information	Company: <input type="text"/>
Billing Information	Channel: Houzz
Invoices	Payment Date: * <input type="text"/>
Payments	Payment Amount: <input type="text"/>
	Payment Method: * Select
	Reference #: <input type="text"/>
	<input type="button" value="Save"/>

4. Click **Save**. The **Payment Summary** box on the Channel Payment page is populated with the payment details.

Home > Customers List > Channel Customers > Sample channel customer > Channel Payment

General Information	Payment added successfully									
Billing Information	Company: <input type="text"/>	<table border="0"> <tr><td colspan="2">Payment Summary</td></tr> <tr><td>Payment Amount:</td><td>\$75.00</td></tr> <tr><td>Total Paid:</td><td>\$0.00</td></tr> <tr><td>Balance:</td><td>\$75.00</td></tr> </table>	Payment Summary		Payment Amount:	\$75.00	Total Paid:	\$0.00	Balance:	\$75.00
Payment Summary										
Payment Amount:	\$75.00									
Total Paid:	\$0.00									
Balance:	\$75.00									
Invoices	Channel: Houzz									
Payments	Payment Date: * <input type="text" value="7/31/2023"/>									
	Payment Amount: <input type="text" value="75"/>									
	Payment Method: * Cash									
	Reference #: <input type="text" value="001"/>									
	<input type="button" value="Save"/>									

Apply Payment

Select Action

Paid Invoices

<input type="checkbox"/>	Invoice ID	Invoice Date	Invoice Amount	Paid Amount
No records to display.				

Open Invoices

<input type="checkbox"/>	Invoice ID	Invoice Date	Invoice Amount	Open Balance	Amount To Pay
<input type="checkbox"/>	73	03/21/2019	\$0.00	\$0.00	<input type="text"/>
<input type="checkbox"/>	74	03/21/2019	\$0.00	\$0.00	<input type="text"/>

You can see the newly added payment at the top of the list on the Channel Customer **Payments** page.

Apply Channel Invoice Payment

To Apply a recorded Payment to a channel invoice:

1. Navigate to **Customers > Channel Customers** > choose the channel customer's **Display Name**.
2. Go to **Payments** and click the desired **Payment ID**.

Home > Customers List > Channel Customers >

General Information
Billing Information
Invoices
Payments

Company:
 Channel: Wholesale
 Date From:
 Date To:
 Payment Method: ALL
 Reference #:
 Payment Amount:

Search

Add Payment Select Action **Go**

<input type="checkbox"/>	Payment ID	Payment Date	Payment Method	Reference #	Amount	Open Balance
<input type="checkbox"/>	37	1/18/2022	CreditCard		\$700.00	\$0.00
<input type="checkbox"/>	36	2/12/2021	Cash	515	\$700.00	(\$7,971.94)

3. The **Payment Summary** box on the Channel **Payments** page shows:

- **Payment Amount** – The amount covered by the specific payment.
- **Total Paid** – The total amount charged so far for the same channel invoices.
- **Balance** – The remaining **Payment Amount**, after the invoice **Total Paid** amount is deducted.

Company:
 Channel: Wholesale
 Payment Date: * 2/12/2021
 Payment Amount: 700
 Payment Method: * Cash
 Reference #: 515

Payment Summary
 Payment Amount: \$700.00
 Total Paid: \$8,671.94
 Balance: (\$7,971.94)

Save

Apply Payment

Select Action **Go**

Paid Invoices

<input type="checkbox"/>	Invoice ID	Invoice Date	Invoice Amount	Paid Amount
<input type="checkbox"/>	115	2/12/2021	\$8,671.94	\$8,671.94

Open Invoices

<input type="checkbox"/>	Invoice ID	Invoice Date	Invoice Amount	Open Balance	Amount To Pay
<input type="checkbox"/>	101	09/03/2019	\$707.00	\$7.00	<input type="text"/>
<input type="checkbox"/>	109	03/01/2020	\$19,787.21	\$19,787.21	<input type="text"/>
<input type="checkbox"/>	118	07/04/2023	\$7,600.13	\$7,600.13	<input type="text"/>
<input type="checkbox"/>	124	08/01/2023	\$0.00	\$0.00	<input type="text"/>
<input type="checkbox"/>	125	08/01/2023	\$0.00	\$0.00	<input type="text"/>

Apply Payment

4. In the **Open Invoices** grid, select an invoice and populate the entire or partial **Amount To Pay**, and click **Apply Payment**.

5. Check the **Payment Summary** and the **Paid Invoices** grid, to verify the correct **Balance** after the applied

Home > Customers List > Channel Customers > > Channel Payment

General Information
Billing Information
Invoices
Payments

1: Selected Payment(s) applied successfully

Company:
Channel: Wholesale
Payment Date: * 7/31/2023
Payment Amount: 123456
Payment Method: * Cash
Reference #:

Payment Summary
Payment Amount: \$123,456.00
Total Paid: \$6.00
Balance: \$123,450.00

Save

Apply Payment

Select Action **Go**

Paid Invoices

<input type="checkbox"/>	Invoice ID	Invoice Date	Invoice Amount	Paid Amount
<input type="checkbox"/>	101	9/3/2019	\$707.00	\$6.00

Open Invoices

<input type="checkbox"/>	Invoice ID	Invoice Date	Invoice Amount	Open Balance	Amount To Pay
<input type="checkbox"/>	101	09/03/2019	\$707.00	\$1.00	<input type="text"/>
<input type="checkbox"/>	109	03/01/2020	\$19,787.21	\$19,787.21	<input type="text"/>
<input type="checkbox"/>	118	07/04/2023	\$7,600.13	\$7,600.13	<input type="text"/>
<input type="checkbox"/>	124	08/01/2023	\$0.00	\$0.00	<input type="text"/>
<input type="checkbox"/>	125	08/01/2023	\$0.00	\$0.00	<input type="text"/>

Apply Payment

payment.

If you applied a partial payment to an open invoice, you can verify the updated **Open Balance** in the **Open Invoices** grid.

Update Channel Invoice Payment

In case you want to correct an existing **Payment Amount**, you can **Update the Channel Invoice Payment**:

1. Navigate to **Channel Customer Payments** and click on the desired **Payment ID**.
2. Modify the **Payment Amount**.

3. Click **Save**.

Home > Customers List > Channel Customers > > Channel Payment

General Information
Billing Information
Invoices
Payments

Company:
Channel: Wholesale
Payment Date: * 7/31/2023
Payment Amount: 123466
Payment Method: * Cash
Reference #:

Payment Summary
Payment Amount: \$123,456.00
Total Paid: \$6.00
Balance: \$123,450.00

Save

The **Channel Payment** is updated successfully.

Delete Channel Invoice Payment

If necessary, you have the option to delete an **Applied Invoice Payment** or **Channel Invoice Payment**.

Delete Applied Payment

If an **Applied Invoice Payment** should be deleted:

1. Open the respective **Channel Payment**.
2. Check the **Paid Invoices**, for which you would like to remove the payment.
3. From the **Select Action** dropdown, choose **Delete**.

4. Click **Go**.

Invoice ID	Invoice Date	Invoice Amount	Paid Amount
<input checked="" type="checkbox"/> 101	9/3/2019	\$707.00	\$0.99

The **Paid Invoices** grid and the **Payment Summary** will no longer display the payment record.

Delete Channel Customer Payment

To fully delete a **Channel Invoice Payment**:

1. Navigate to **Customers > Channel Customers** > click on the channel customer's **Display Name**.
2. Go to **Payments** and check the desired payment/s.
3. From the **Select Action** dropdown, choose **Delete**.
4. Click **Go** and reconfirm your action.

Home > Customers List > Channel Customers >

General Information
Billing Information
Invoices
Payments

Company:
Channel: Wholesale
Date From:
Date To:
Payment Method: ALL
Reference #:
Payment Amount:
Search

Add Payment

<input type="checkbox"/>	Payment ID	Payment Date	Payment Method	Reference	Amount	Balance
<input checked="" type="checkbox"/>	40	7/31/2023	Cash		\$123,456.00	\$123,450.00
<input checked="" type="checkbox"/>	37	1/18/2022	CreditCard		\$700.00	\$0.00
<input type="checkbox"/>	36	2/12/2021	Cash	515	\$700.00	(\$7,971.94)

Select Action
Select Action
Delete

Go

The Channel Invoice Payment will be removed from Sellercloud.