

How do I use Deposits?



Joseph Aizawa
Sr. Product Trainer

Deposits allow you to collect what you need before starting a service. You can manually record payments that have been taken in your shop, or request an amount that you set and easily collect it using online payments. *Collecting payments electronically is a feature of Shopmonkey Payments. If you haven't enabled the feature yet check out our [help article](#) to learn more.*

Manually Record Deposit

To record a deposit that was collected in your shop click the **New Payment** button on the order. The full amount for the order will appear as the amount but you can click on the amount and change it to the deposit amount.


Choose the method of payment for the deposit and even add a note to record the transaction was for a deposit. The remaining amount will be what is due when the service is complete.


New Payment ✕


→ \$50.00
Remaining Due: \$642.09


Charge Online

or



Card


Cash


Check


Charge Card
\$50.00
Payment Amount

Cardholder Name

Card Number
 4242 4242 4242 4242

Note (optional)

Pay \$50.00

Collect Electronically with Shopmonkey Payments

To start collecting a deposit, send an estimate to the customer. Turn on the Collect Payment option by flipping the toggle. When the Collect Payment option is turned on, the Requested Amount field will appear.

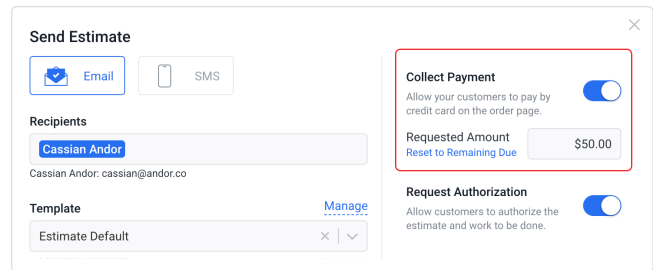
The amount of the full order will be entered into the Requested Amount, but you can change the amount by clicking into the field and typing the new amount. This new amount will be the deposit amount requested.

When the customer reviews the order, they can see the full cost of all services, but only the amount requested will show as the **Amount to Pay**.

When the customer clicks **Pay**, the requested amount will show, and they can easily complete the payment, but customers can also change the amount they want to pay by clicking in the amount field and typing in a new amount.

When the amount is collected and applied to the Grand total of the order, the remaining amount is the new total that the customer owes when the service is complete.

Note that deposit payments collected from the estimate will be synced over to QuickBooks and recorded without the order being invoiced. The payment will appear in 'undeposited funds'. After invoicing, the payment will appear in the list of payments applied to the invoice.



Send Estimate

Email SMS

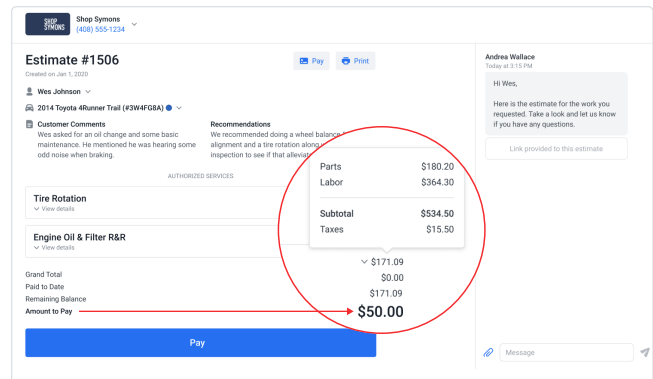
Recipients
Cassian Andor
Cassian Andor: cassian@andor.co

Template
Estimate Default Manage

Collect Payment
Allow your customers to pay by credit card on the order page.

Requested Amount
[Reset to Remaining Due](#)

Request Authorization
Allow customers to authorize the estimate and work to be done.



Estimate #1506
Created on Jan 1, 2020

Wes Johnson
2014 Toyota 4Runner Trail (K3W4FG8A)

Customer Comments
Wes asked for an oil change and some basic maintenance. He mentioned he was hearing some odd noise when braking.

Recommendations
We recommended doing a wheel balance alignment and a tire rotation along with inspection to see if that advised.

Parts	\$180.20
Labor	\$364.30
Subtotal	\$534.50
Taxes	\$15.50
Grand Total	\$550.00
Paid to Date	\$0.00
Remaining Balance	\$550.00
Amount to Pay	\$50.00

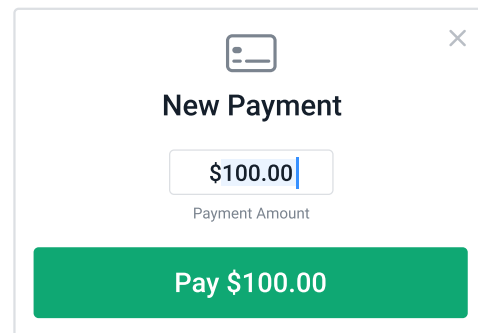
Authorized Services

- Tire Rotation
- Engine Oil & Filter R&R

Andrea Wallace
Hi Wes,
Here is the estimate for the work you requested. Take a look and let us know if you have any questions.
[Link provided to this estimate](#)

Pay

Only the amount requested will show as the **Amount to Pay**.

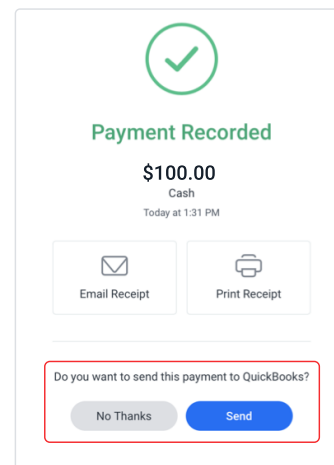


New Payment

Payment Amount

Pay \$100.00

Customers can also change the amount they want to pay.



Payment Recorded

\$100.00
Cash
Today at 1:31 PM

Email Receipt Print Receipt

Do you want to send this payment to QuickBooks?

Note that Deposit payments collected from the estimate will be synced over to QuickBooks.