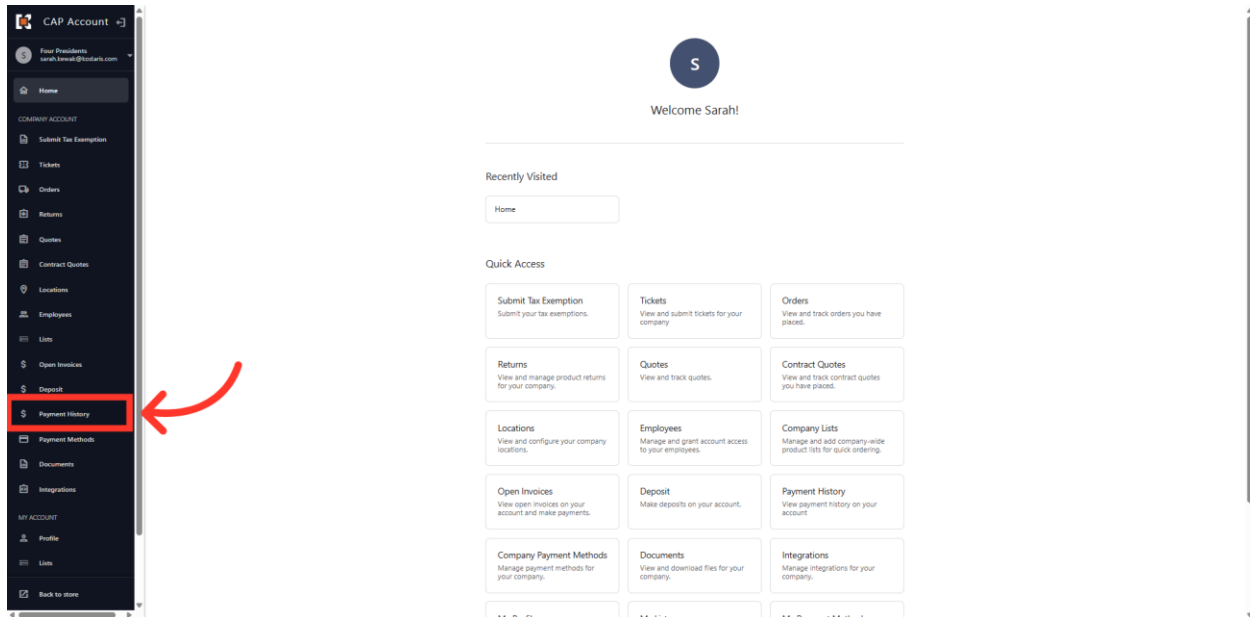


1. Navigate To Payment Section

You can track and review payment transactions by using the Payment History section in the Customer Portal. First, navigate to the "Payment History" section.



2. Open Payment History Tab

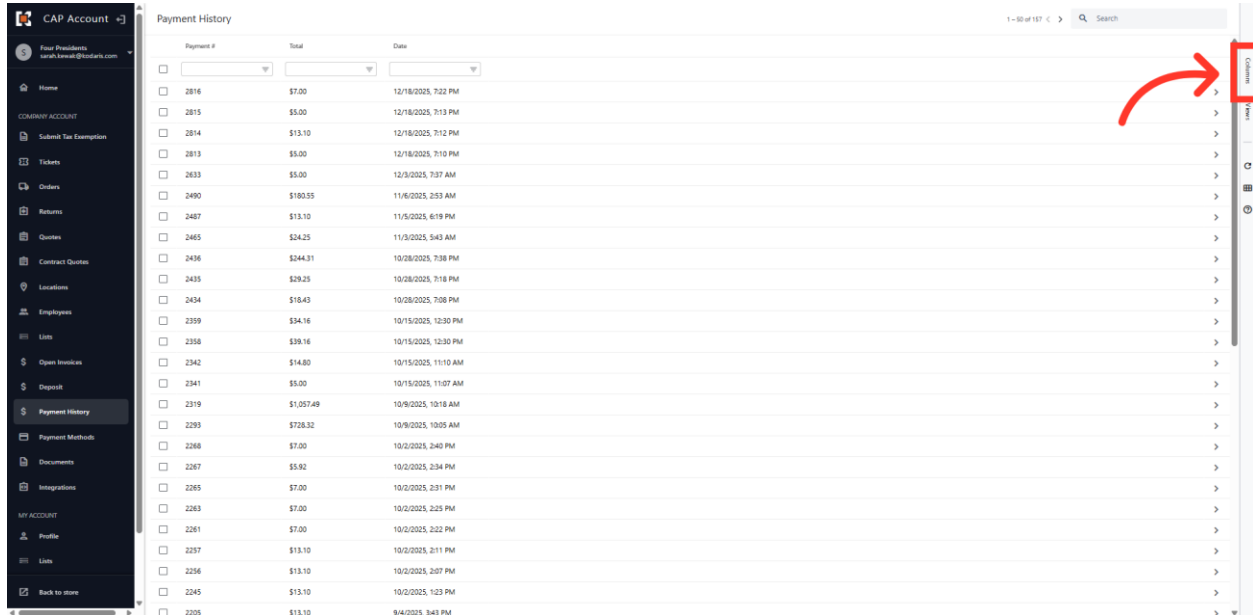
The Payment History dashboard lists all payment transaction for the company. You can select a payment from the grid view or search for a specific payment using the column headers. To complete these actions, you will need the "Accounts Payable" permission.

The screenshot shows the 'Payment History' dashboard. At the top, there is a search bar and a table with columns: Payment #, Total, and Date. A red box highlights the first three columns, and a red arrow points to it. The table contains 25 rows of payment data.

Payment #	Total	Date
2816	\$7.00	12/18/2025, 7:22 PM
2815	\$5.00	12/18/2025, 7:13 PM
2814	\$13.10	12/18/2025, 7:12 PM
2813	\$5.00	12/18/2025, 7:10 PM
2833	\$5.00	12/3/2025, 7:37 AM
2490	\$180.55	11/6/2025, 2:53 AM
2487	\$13.10	11/5/2025, 6:19 PM
2485	\$24.25	11/3/2025, 5:43 AM
2436	\$244.31	10/28/2025, 7:38 PM
2435	\$29.25	10/28/2025, 7:18 PM
2434	\$18.40	10/28/2025, 7:08 PM
2359	\$34.16	10/1/2025, 12:30 PM
2358	\$39.16	10/1/2025, 12:30 PM
2342	\$14.80	10/1/2025, 11:10 AM
2341	\$5.00	10/1/2025, 11:07 AM
2319	\$1,057.49	10/9/2025, 10:18 AM
2293	\$728.32	10/9/2025, 10:05 AM
2288	\$7.00	10/2/2025, 2:40 PM
2267	\$5.92	10/2/2025, 2:34 PM
2265	\$7.00	10/2/2025, 2:31 PM
2263	\$7.00	10/2/2025, 2:25 PM
2281	\$7.00	10/2/2025, 2:22 PM
2257	\$13.10	10/2/2025, 2:11 PM
2256	\$13.10	10/2/2025, 2:07 PM
2245	\$13.10	10/2/2025, 1:23 PM
2205	\$13.10	9/4/2025, 3:43 PM

3. Click "Columns"

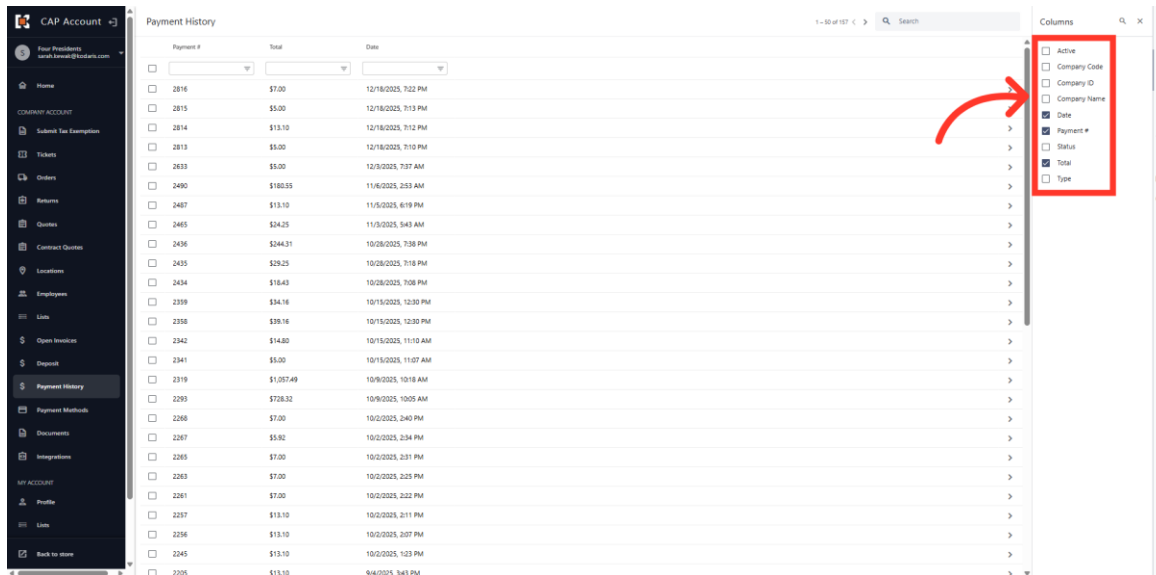
You can also customize your Payment History view by clicking on the "Columns" tab on the right hand side of the grid.



The screenshot shows the CAP Account interface with the 'Payment History' view. On the right side of the grid, there is a vertical tab labeled 'Columns' which is highlighted with a red box and a red arrow pointing to it. The grid displays a list of payments with columns for Payment #, Total, and Date.

4. Add Column Headers

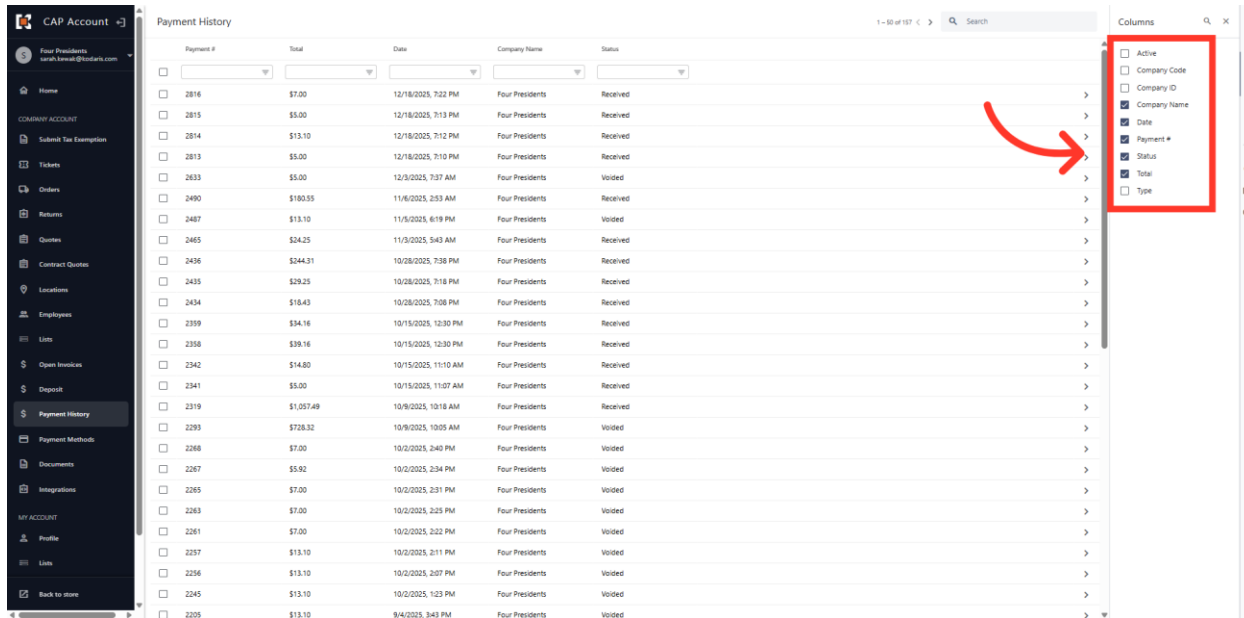
Here, you can add or remove columns by clicking the check box associated with the column header name.



The screenshot shows the CAP Account interface with the 'Payment History' view. The 'Columns' panel is open on the right side of the grid, showing a list of columns to be added or removed. The columns listed are: Active, Company Code, Company ID, Company Name, Date, Payment #, Status, Total, and Type. The 'Payment #' column is currently selected, indicated by a red box and a red arrow pointing to it.

5. Select Options

In this example we will add "Company Name" and "Status" to our view.

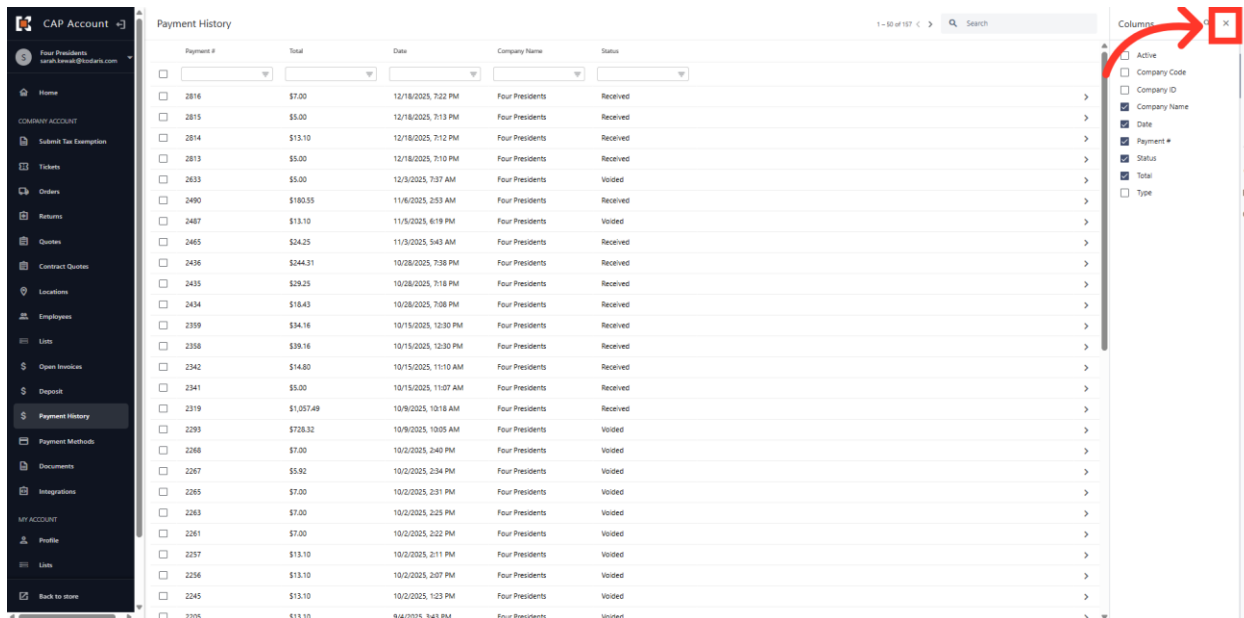


The screenshot shows the 'Payment History' table in the CAP Account interface. The table has columns for Payment #, Total, Date, Company Name, and Status. A red arrow points to the 'Columns' menu on the right, which is open and shows a list of columns to be displayed. The 'Company Name' and 'Status' options are checked, indicating they have been selected for the view.

Payment #	Total	Date	Company Name	Status
2816	\$7.00	12/18/2025, 7:22 PM	Four Presidents	Received
2815	\$5.00	12/18/2025, 7:13 PM	Four Presidents	Received
2814	\$13.10	12/18/2025, 7:12 PM	Four Presidents	Received
2813	\$5.00	12/18/2025, 7:10 PM	Four Presidents	Received
2833	\$5.00	12/3/2025, 7:37 AM	Four Presidents	Voided
2490	\$180.55	11/6/2025, 2:53 AM	Four Presidents	Received
2487	\$13.10	11/5/2025, 6:19 PM	Four Presidents	Voided
2465	\$24.25	11/3/2025, 5:43 AM	Four Presidents	Received
2436	\$244.31	10/28/2025, 7:38 PM	Four Presidents	Received
2435	\$29.25	10/28/2025, 7:18 PM	Four Presidents	Received
2434	\$18.43	10/28/2025, 7:08 PM	Four Presidents	Received
2359	\$34.16	10/15/2025, 12:30 PM	Four Presidents	Received
2356	\$39.16	10/15/2025, 12:30 PM	Four Presidents	Received
2342	\$14.80	10/15/2025, 11:10 AM	Four Presidents	Received
2341	\$5.00	10/15/2025, 11:07 AM	Four Presidents	Received
2319	\$1,057.49	10/9/2025, 10:18 AM	Four Presidents	Received
2293	\$728.32	10/9/2025, 10:05 AM	Four Presidents	Voided
2268	\$7.00	10/2/2025, 2:40 PM	Four Presidents	Voided
2267	\$5.92	10/2/2025, 2:34 PM	Four Presidents	Voided
2265	\$7.00	10/2/2025, 2:31 PM	Four Presidents	Voided
2263	\$7.00	10/2/2025, 2:25 PM	Four Presidents	Voided
2261	\$7.00	10/2/2025, 2:22 PM	Four Presidents	Voided
2257	\$13.10	10/2/2025, 2:11 PM	Four Presidents	Voided
2256	\$13.10	10/2/2025, 2:07 PM	Four Presidents	Voided
2245	\$13.10	10/2/2025, 1:23 PM	Four Presidents	Voided
2205	\$13.10	9/4/2025, 3:43 PM	Four Presidents	Voided

6. Click the "x"

Once you have selected your columns, click the "x" to close the menu.

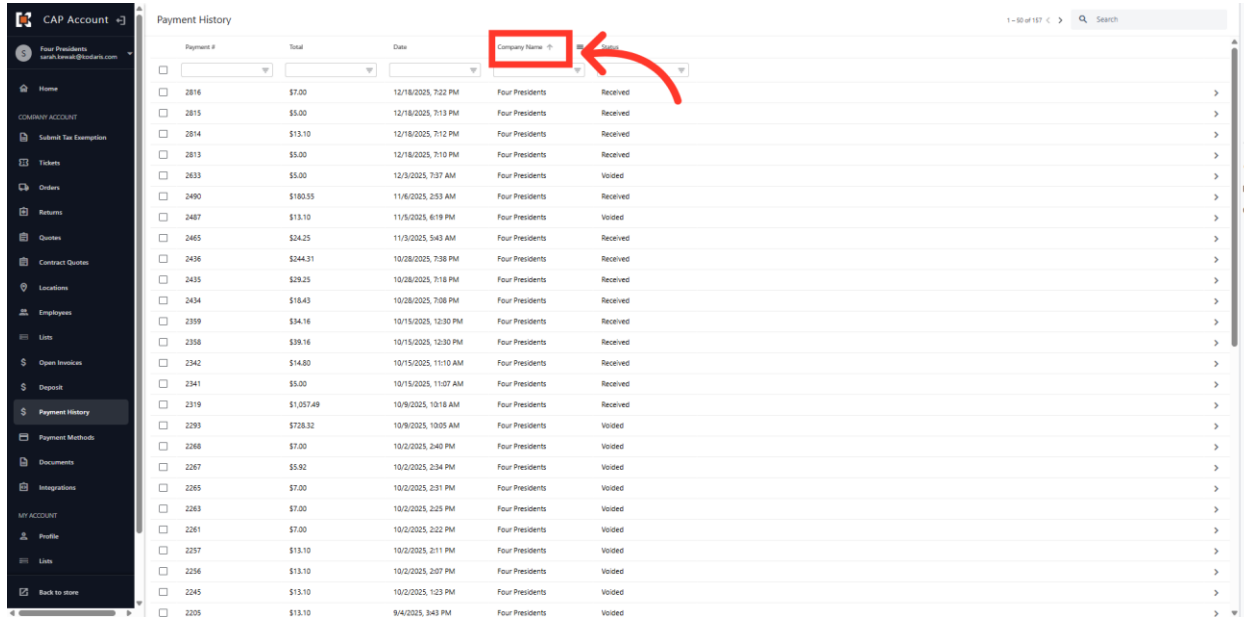


The screenshot shows the 'Payment History' table in the CAP Account interface. The 'Columns' menu is now closed, and the table displays the selected columns: Payment #, Total, Date, Company Name, and Status. A red arrow points to the 'x' button in the top right corner of the 'Columns' menu, indicating where to click to close the menu.

Payment #	Total	Date	Company Name	Status
2816	\$7.00	12/18/2025, 7:22 PM	Four Presidents	Received
2815	\$5.00	12/18/2025, 7:13 PM	Four Presidents	Received
2814	\$13.10	12/18/2025, 7:12 PM	Four Presidents	Received
2813	\$5.00	12/18/2025, 7:10 PM	Four Presidents	Received
2833	\$5.00	12/3/2025, 7:37 AM	Four Presidents	Voided
2490	\$180.55	11/6/2025, 2:53 AM	Four Presidents	Received
2487	\$13.10	11/5/2025, 6:19 PM	Four Presidents	Voided
2465	\$24.25	11/3/2025, 5:43 AM	Four Presidents	Received
2436	\$244.31	10/28/2025, 7:38 PM	Four Presidents	Received
2435	\$29.25	10/28/2025, 7:18 PM	Four Presidents	Received
2434	\$18.43	10/28/2025, 7:08 PM	Four Presidents	Received
2359	\$34.16	10/15/2025, 12:30 PM	Four Presidents	Received
2356	\$39.16	10/15/2025, 12:30 PM	Four Presidents	Received
2342	\$14.80	10/15/2025, 11:10 AM	Four Presidents	Received
2341	\$5.00	10/15/2025, 11:07 AM	Four Presidents	Received
2319	\$1,057.49	10/9/2025, 10:18 AM	Four Presidents	Received
2293	\$728.32	10/9/2025, 10:05 AM	Four Presidents	Voided
2268	\$7.00	10/2/2025, 2:40 PM	Four Presidents	Voided
2267	\$5.92	10/2/2025, 2:34 PM	Four Presidents	Voided
2265	\$7.00	10/2/2025, 2:31 PM	Four Presidents	Voided
2263	\$7.00	10/2/2025, 2:25 PM	Four Presidents	Voided
2261	\$7.00	10/2/2025, 2:22 PM	Four Presidents	Voided
2257	\$13.10	10/2/2025, 2:11 PM	Four Presidents	Voided
2256	\$13.10	10/2/2025, 2:07 PM	Four Presidents	Voided
2245	\$13.10	10/2/2025, 1:23 PM	Four Presidents	Voided
2205	\$13.10	9/4/2025, 3:43 PM	Four Presidents	Voided

7. Re-Order Columns

You can re-order the columns by clicking in the column header and dragging them within the grid view.

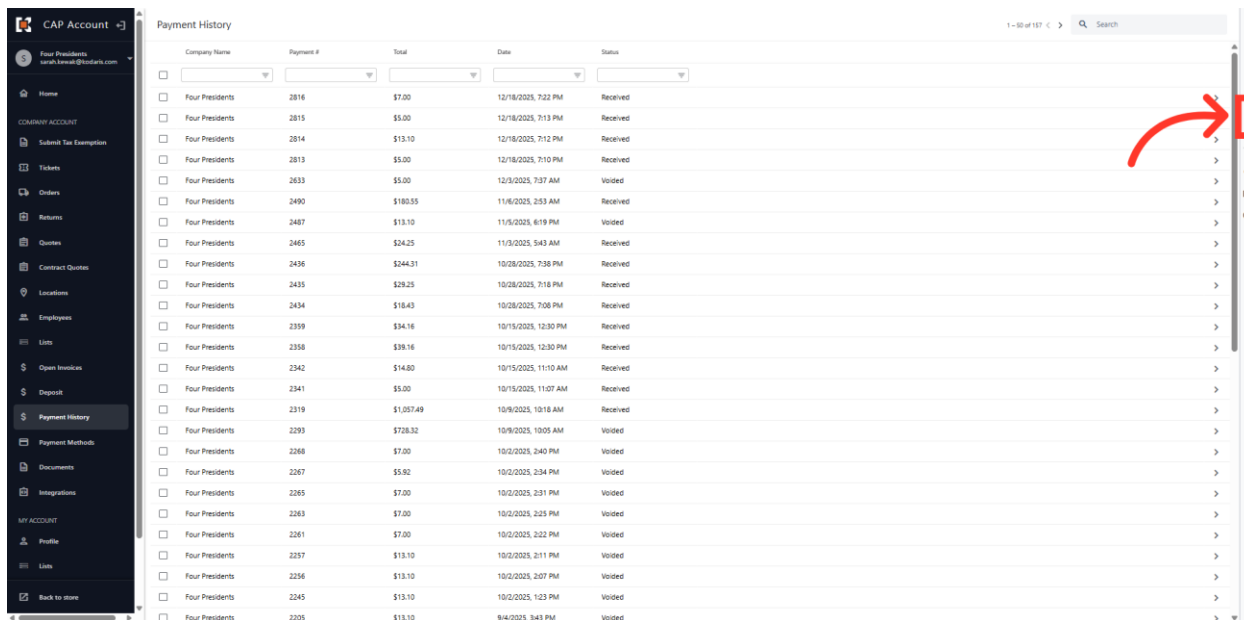


The screenshot shows the 'Payment History' page in the CAP Account interface. The table has columns for Payment #, Total, Date, Company Name, and Status. A red box highlights the 'Company Name' header, and a red arrow indicates it is being dragged to the right, past the 'Status' column, to reorder the columns.

Payment #	Total	Date	Company Name	Status
2816	\$7.00	12/18/2025, 7:22 PM	Four Presidents	Received
2815	\$5.00	12/18/2025, 7:13 PM	Four Presidents	Received
2814	\$13.10	12/18/2025, 7:12 PM	Four Presidents	Received
2813	\$5.00	12/18/2025, 7:10 PM	Four Presidents	Received
2633	\$5.00	12/9/2025, 7:37 AM	Four Presidents	Voided
2490	\$180.55	11/6/2025, 2:53 AM	Four Presidents	Received
2487	\$13.10	11/5/2025, 6:19 PM	Four Presidents	Voided
2465	\$24.25	11/3/2025, 5:43 AM	Four Presidents	Received
2436	\$244.31	10/28/2025, 7:38 PM	Four Presidents	Received
2435	\$29.25	10/28/2025, 7:18 PM	Four Presidents	Received
2434	\$18.43	10/28/2025, 7:08 PM	Four Presidents	Received
2359	\$34.16	10/15/2025, 12:30 PM	Four Presidents	Received
2358	\$39.16	10/15/2025, 12:30 PM	Four Presidents	Received
2342	\$14.80	10/15/2025, 11:10 AM	Four Presidents	Received
2341	\$5.00	10/15/2025, 11:07 AM	Four Presidents	Received
2319	\$1,057.49	10/9/2025, 10:18 AM	Four Presidents	Received
2299	\$728.32	10/9/2025, 10:05 AM	Four Presidents	Voided
2268	\$7.00	10/2/2025, 2:40 PM	Four Presidents	Voided
2267	\$5.92	10/2/2025, 2:34 PM	Four Presidents	Voided
2265	\$7.00	10/2/2025, 2:31 PM	Four Presidents	Voided
2263	\$7.00	10/2/2025, 2:25 PM	Four Presidents	Voided
2261	\$7.00	10/2/2025, 2:22 PM	Four Presidents	Voided
2257	\$13.10	10/2/2025, 2:11 PM	Four Presidents	Voided
2256	\$13.10	10/2/2025, 2:07 PM	Four Presidents	Voided
2245	\$13.10	10/2/2025, 1:23 PM	Four Presidents	Voided
2205	\$13.10	9/4/2025, 3:43 PM	Four Presidents	Voided

8. Click "Views"

You can save your custom view by clicking the "View" tab on the right hand side of the grid.

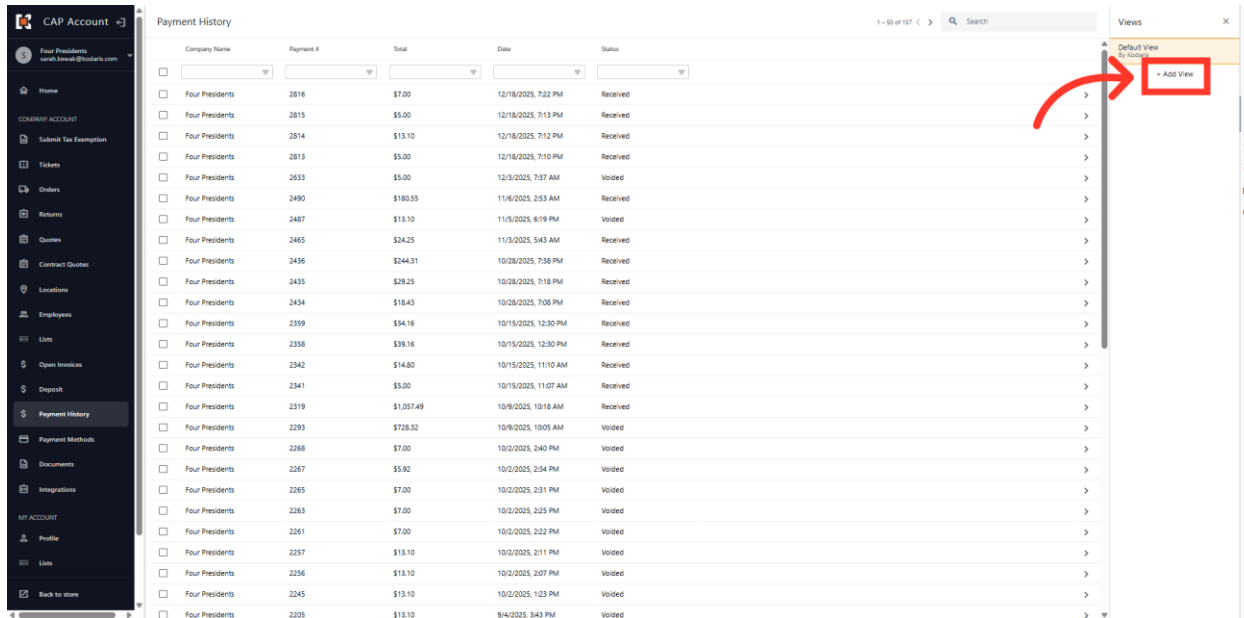


The screenshot shows the 'Payment History' page in the CAP Account interface. The table has columns for Company Name, Payment #, Total, Date, and Status. A red arrow points to the 'Views' tab on the right side of the grid, indicating where to click to save a custom view.

Company Name	Payment #	Total	Date	Status
Four Presidents	2816	\$7.00	12/18/2025, 7:22 PM	Received
Four Presidents	2815	\$5.00	12/18/2025, 7:13 PM	Received
Four Presidents	2814	\$13.10	12/18/2025, 7:12 PM	Received
Four Presidents	2813	\$5.00	12/18/2025, 7:10 PM	Received
Four Presidents	2633	\$5.00	12/9/2025, 7:37 AM	Voided
Four Presidents	2490	\$180.55	11/6/2025, 2:53 AM	Received
Four Presidents	2487	\$13.10	11/5/2025, 6:19 PM	Voided
Four Presidents	2465	\$24.25	11/3/2025, 5:43 AM	Received
Four Presidents	2436	\$244.31	10/28/2025, 7:38 PM	Received
Four Presidents	2435	\$29.25	10/28/2025, 7:18 PM	Received
Four Presidents	2434	\$18.43	10/28/2025, 7:08 PM	Received
Four Presidents	2359	\$34.16	10/15/2025, 12:30 PM	Received
Four Presidents	2358	\$39.16	10/15/2025, 12:30 PM	Received
Four Presidents	2342	\$14.80	10/15/2025, 11:10 AM	Received
Four Presidents	2341	\$5.00	10/15/2025, 11:07 AM	Received
Four Presidents	2319	\$1,057.49	10/9/2025, 10:18 AM	Received
Four Presidents	2299	\$728.32	10/9/2025, 10:05 AM	Voided
Four Presidents	2268	\$7.00	10/2/2025, 2:40 PM	Voided
Four Presidents	2267	\$5.92	10/2/2025, 2:34 PM	Voided
Four Presidents	2265	\$7.00	10/2/2025, 2:31 PM	Voided
Four Presidents	2263	\$7.00	10/2/2025, 2:25 PM	Voided
Four Presidents	2261	\$7.00	10/2/2025, 2:22 PM	Voided
Four Presidents	2257	\$13.10	10/2/2025, 2:11 PM	Voided
Four Presidents	2256	\$13.10	10/2/2025, 2:07 PM	Voided
Four Presidents	2245	\$13.10	10/2/2025, 1:23 PM	Voided
Four Presidents	2205	\$13.10	9/4/2025, 3:43 PM	Voided

9. Click "Add View"

Next, click "Add View".

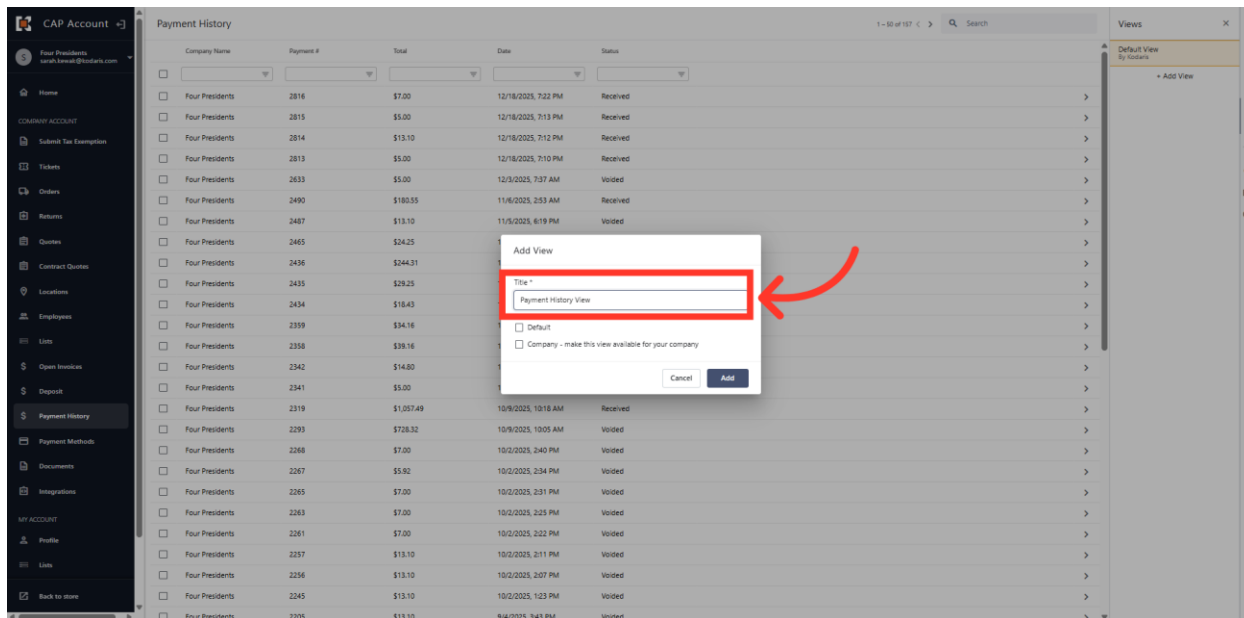


The screenshot shows the 'CAP Account' interface with the 'Payment History' tab selected. A table lists payment details for 'Four Presidents'. On the right, a 'Views' panel shows 'Default View By Location' and a red box highlights the '+ Add View' button. A red arrow points from the text 'Next, click "Add View"' to this button.

Company Name	Payment #	Total	Date	Status
Four Presidents	2816	\$7.00	12/18/2025, 7:22 PM	Received
Four Presidents	2815	\$5.00	12/18/2025, 7:13 PM	Received
Four Presidents	2814	\$13.10	12/18/2025, 7:12 PM	Received
Four Presidents	2813	\$5.00	12/18/2025, 7:10 PM	Received
Four Presidents	2833	\$5.00	12/3/2025, 7:37 AM	Voided
Four Presidents	2490	\$180.35	11/6/2025, 2:53 AM	Received
Four Presidents	2487	\$13.10	11/5/2025, 6:19 PM	Voided
Four Presidents	2465	\$24.25	11/3/2025, 5:43 AM	Received
Four Presidents	2436	\$244.31	10/28/2025, 7:38 PM	Received
Four Presidents	2435	\$29.25	10/28/2025, 7:18 PM	Received
Four Presidents	2434	\$18.43	10/28/2025, 7:08 PM	Received
Four Presidents	2399	\$34.16	10/15/2025, 12:30 PM	Received
Four Presidents	2358	\$39.16	10/15/2025, 12:30 PM	Received
Four Presidents	2342	\$14.80	10/15/2025, 11:10 AM	Received
Four Presidents	2341	\$5.00	10/15/2025, 11:07 AM	Received
Four Presidents	2319	\$1,057.49	10/9/2025, 10:18 AM	Received
Four Presidents	2293	\$728.32	10/9/2025, 10:05 AM	Voided
Four Presidents	2268	\$7.00	10/2/2025, 2:40 PM	Voided
Four Presidents	2267	\$5.92	10/2/2025, 2:34 PM	Voided
Four Presidents	2265	\$7.00	10/2/2025, 2:31 PM	Voided
Four Presidents	2263	\$7.00	10/2/2025, 2:25 PM	Voided
Four Presidents	2261	\$7.00	10/2/2025, 2:22 PM	Voided
Four Presidents	2257	\$13.10	10/2/2025, 2:11 PM	Voided
Four Presidents	2256	\$13.10	10/2/2025, 2:07 PM	Voided
Four Presidents	2245	\$13.10	10/2/2025, 1:23 PM	Voided
Four Presidents	2205	\$13.10	9/4/2025, 3:43 PM	Voided

10. Name the View

Then, name the custom view.



The screenshot shows the same 'CAP Account' interface. The 'Add View' dialog box is open, and the 'Title' field is filled with 'Payment History View'. A red box highlights the 'Title' field, and a red arrow points from the text 'Then, name the custom view.' to this field.

Add View

Title *

Payment History View

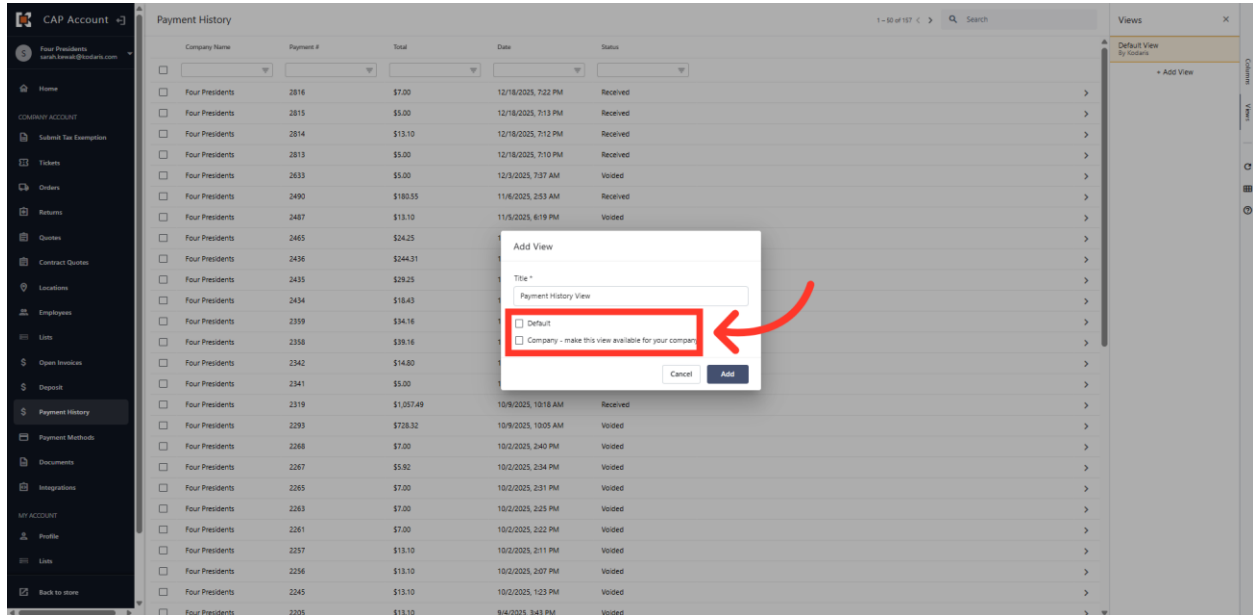
☐ Default

☐ Company - make this view available for your company

Cancel Add

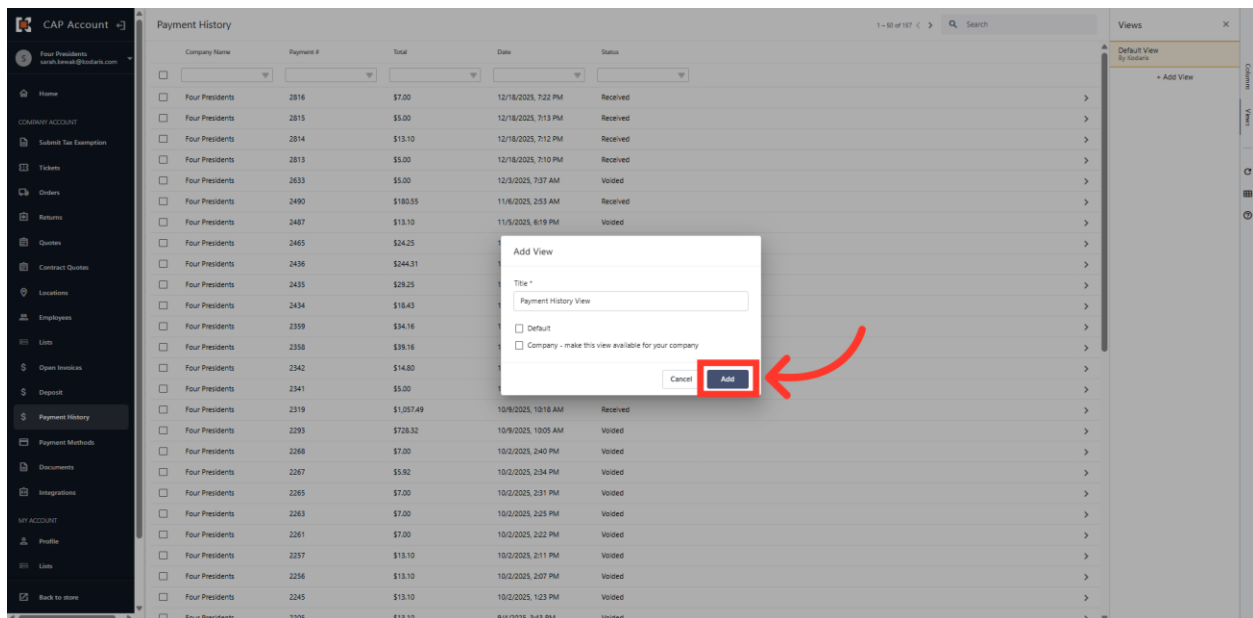
11. Default or Company View

You can set the view as your default view so that when you are in Payment History, these details always populate. You can also make it available for all users in the company.



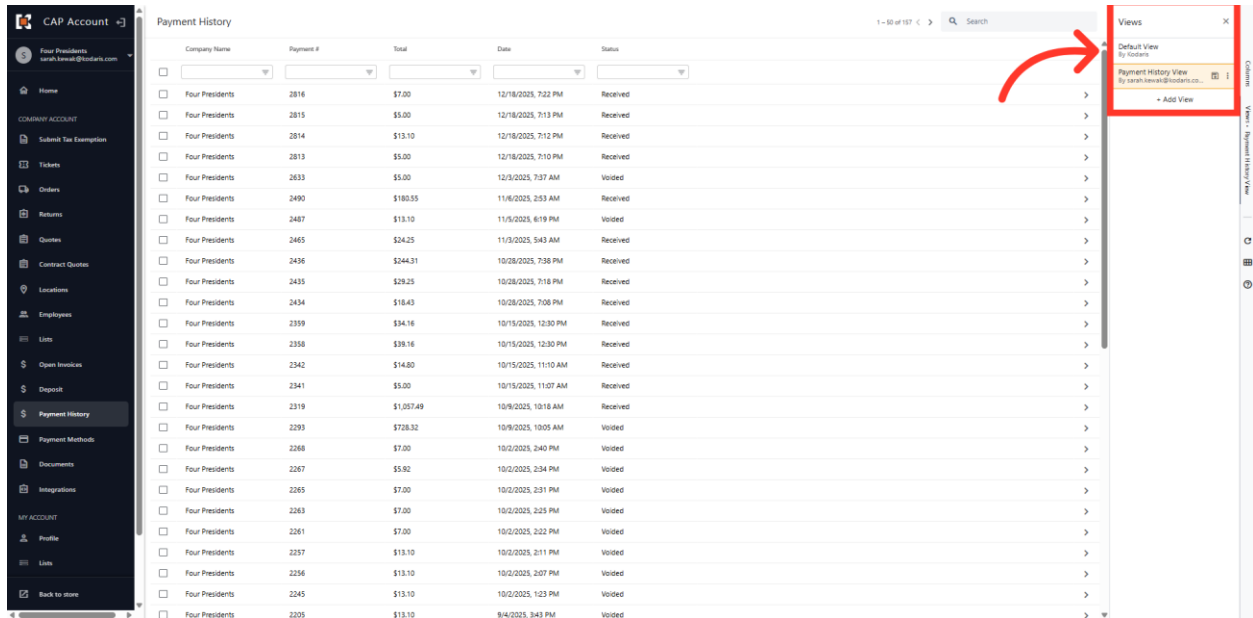
12. Click "Add"

Next, click "Add" to save the view settings.



13. Click Views

You can now toggle between the available saved views.

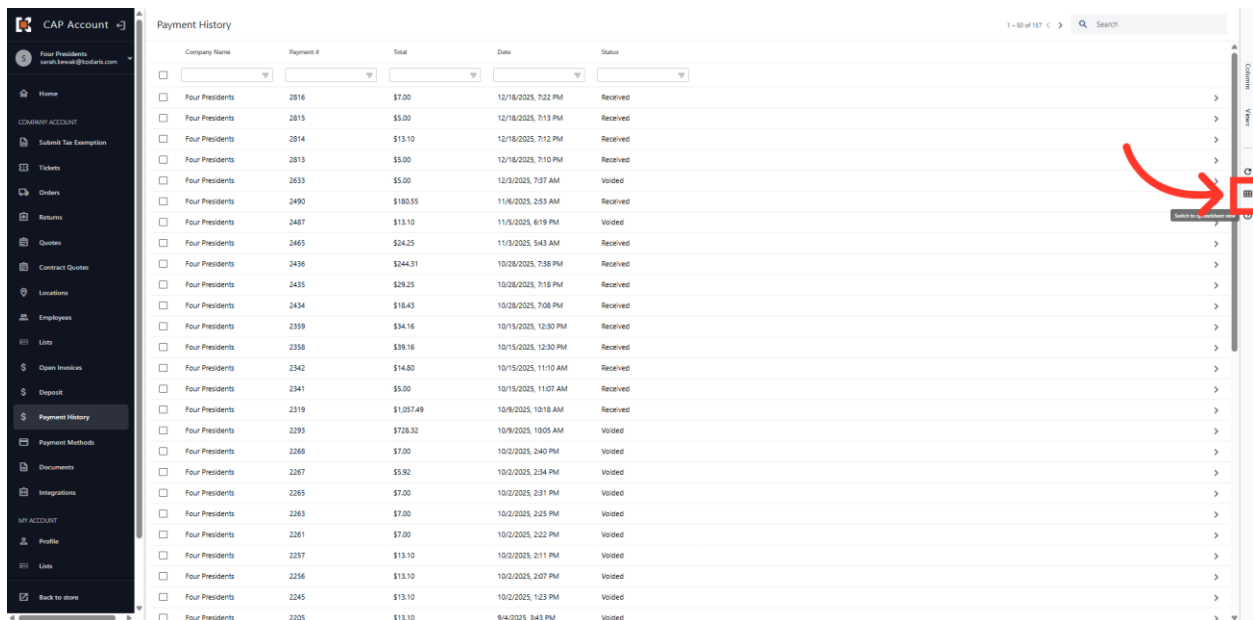


The screenshot shows the CAP Account interface with the Payment History page selected. A red arrow points to the 'Views' dropdown menu in the top right corner. The dropdown menu is open, showing two options: 'Default View' and 'Payment History View'. The 'Payment History View' option is highlighted, and there is an 'Add View' button below it.

Company Name	Payment #	Total	Date	Status
Four Presidents	2816	\$7.00	12/18/2025, 7:22 PM	Received
Four Presidents	2815	\$5.00	12/18/2025, 7:13 PM	Received
Four Presidents	2814	\$13.10	12/18/2025, 7:12 PM	Received
Four Presidents	2813	\$5.00	12/18/2025, 7:10 PM	Received
Four Presidents	2833	\$5.00	12/9/2025, 7:37 AM	Voided
Four Presidents	2490	\$180.55	11/6/2025, 2:53 AM	Received
Four Presidents	2487	\$13.10	11/5/2025, 6:19 PM	Voided
Four Presidents	2465	\$24.25	11/3/2025, 5:43 AM	Received
Four Presidents	2436	\$244.31	10/28/2025, 7:38 PM	Received
Four Presidents	2435	\$29.25	10/28/2025, 7:18 PM	Received
Four Presidents	2434	\$18.43	10/28/2025, 7:08 PM	Received
Four Presidents	2399	\$34.16	10/15/2025, 12:30 PM	Received
Four Presidents	2358	\$39.16	10/15/2025, 12:30 PM	Received
Four Presidents	2342	\$14.80	10/15/2025, 11:10 AM	Received
Four Presidents	2341	\$5.00	10/15/2025, 11:07 AM	Received
Four Presidents	2319	\$1,057.49	10/9/2025, 10:18 AM	Received
Four Presidents	2293	\$728.32	10/9/2025, 10:05 AM	Voided
Four Presidents	2268	\$7.00	10/2/2025, 2:40 PM	Voided
Four Presidents	2267	\$5.92	10/2/2025, 2:34 PM	Voided
Four Presidents	2265	\$7.00	10/2/2025, 2:31 PM	Voided
Four Presidents	2263	\$7.00	10/2/2025, 2:25 PM	Voided
Four Presidents	2261	\$7.00	10/2/2025, 2:22 PM	Voided
Four Presidents	2257	\$13.10	10/2/2025, 2:11 PM	Voided
Four Presidents	2256	\$13.10	10/2/2025, 2:07 PM	Voided
Four Presidents	2245	\$13.10	10/2/2025, 1:23 PM	Voided
Four Presidents	2205	\$13.10	9/4/2025, 3:43 PM	Voided

14. Click "Spreadsheet" icon

You can export your Payment History for use in accounting software or for further analysis, by clicking on the "Spreadsheet" icon on the right hand side of the grid.

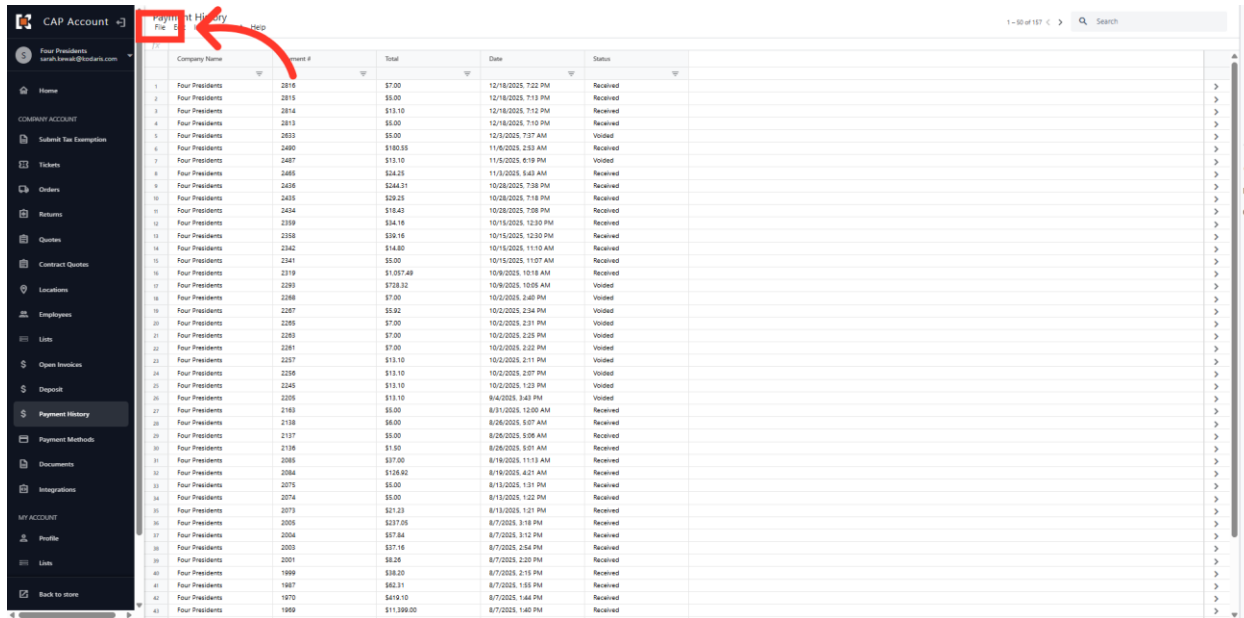


The screenshot shows the CAP Account interface with the Payment History page selected. A red arrow points to the 'Spreadsheet' icon, which is a small icon with a grid pattern, located in the bottom right corner of the grid.

Company Name	Payment #	Total	Date	Status
Four Presidents	2816	\$7.00	12/18/2025, 7:22 PM	Received
Four Presidents	2815	\$5.00	12/18/2025, 7:13 PM	Received
Four Presidents	2814	\$13.10	12/18/2025, 7:12 PM	Received
Four Presidents	2813	\$5.00	12/18/2025, 7:10 PM	Received
Four Presidents	2833	\$5.00	12/9/2025, 7:37 AM	Voided
Four Presidents	2490	\$180.55	11/6/2025, 2:53 AM	Received
Four Presidents	2487	\$13.10	11/5/2025, 6:19 PM	Voided
Four Presidents	2465	\$24.25	11/3/2025, 5:43 AM	Received
Four Presidents	2436	\$244.31	10/28/2025, 7:38 PM	Received
Four Presidents	2435	\$29.25	10/28/2025, 7:18 PM	Received
Four Presidents	2434	\$18.43	10/28/2025, 7:08 PM	Received
Four Presidents	2399	\$34.16	10/15/2025, 12:30 PM	Received
Four Presidents	2358	\$39.16	10/15/2025, 12:30 PM	Received
Four Presidents	2342	\$14.80	10/15/2025, 11:10 AM	Received
Four Presidents	2341	\$5.00	10/15/2025, 11:07 AM	Received
Four Presidents	2319	\$1,057.49	10/9/2025, 10:18 AM	Received
Four Presidents	2293	\$728.32	10/9/2025, 10:05 AM	Voided
Four Presidents	2268	\$7.00	10/2/2025, 2:40 PM	Voided
Four Presidents	2267	\$5.92	10/2/2025, 2:34 PM	Voided
Four Presidents	2265	\$7.00	10/2/2025, 2:31 PM	Voided
Four Presidents	2263	\$7.00	10/2/2025, 2:25 PM	Voided
Four Presidents	2261	\$7.00	10/2/2025, 2:22 PM	Voided
Four Presidents	2257	\$13.10	10/2/2025, 2:11 PM	Voided
Four Presidents	2256	\$13.10	10/2/2025, 2:07 PM	Voided
Four Presidents	2245	\$13.10	10/2/2025, 1:23 PM	Voided
Four Presidents	2205	\$13.10	9/4/2025, 3:43 PM	Voided

15. Click "File"

Then, click "File".

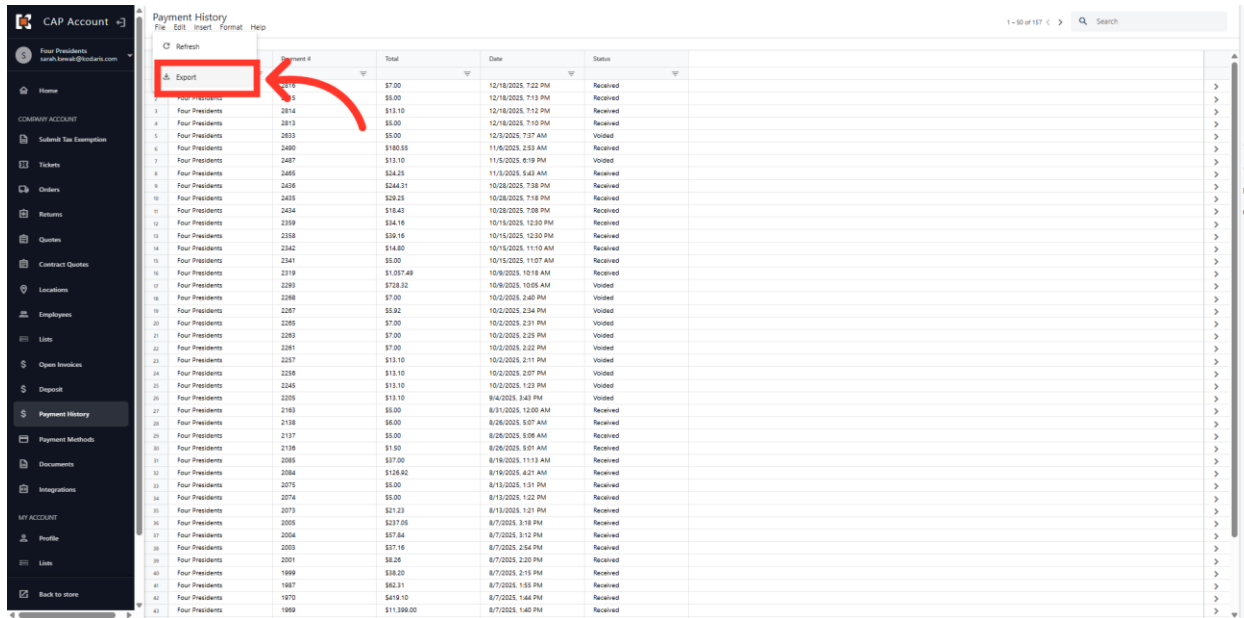


The screenshot shows the CAP Account interface. The left sidebar contains navigation options: Home, COMPANY ACCOUNT, Subsidy Tax Exemptions, Tickets, Orders, Returns, Quotes, Contract Quotes, Locations, Employees, Lists, Open Invoices, Deposit, Payment History (highlighted), Payment Methods, Documents, Integrations, MY ACCOUNT, Profile, and Back to store. The main area displays a table titled 'Payment History' with columns: Company Name, Invoice #, Total, Date, and Status. A red box highlights the 'File' menu option in the top navigation bar, and a red arrow points to it.

Company Name	Invoice #	Total	Date	Status
Four Presidents	2816	\$7.00	12/18/2025, 1:22 PM	Received
Four Presidents	2815	\$5.00	12/18/2025, 1:18 PM	Received
Four Presidents	2814	\$13.10	12/18/2025, 1:12 PM	Received
Four Presidents	2813	\$5.00	12/18/2025, 1:10 PM	Received
Four Presidents	2813	\$5.00	12/18/2025, 7:37 AM	Voided
Four Presidents	2480	\$180.35	11/8/2025, 2:53 AM	Received
Four Presidents	2487	\$13.10	11/5/2025, 6:19 PM	Voided
Four Presidents	2485	\$24.25	11/5/2025, 5:45 AM	Received
Four Presidents	2436	\$244.31	10/28/2025, 7:38 PM	Received
Four Presidents	2435	\$29.25	10/28/2025, 7:18 PM	Received
Four Presidents	2434	\$18.43	10/28/2025, 7:08 PM	Received
Four Presidents	2339	\$34.16	10/15/2025, 12:30 PM	Received
Four Presidents	2338	\$39.16	10/15/2025, 12:30 PM	Received
Four Presidents	2342	\$14.80	10/15/2025, 11:10 AM	Received
Four Presidents	2341	\$5.00	10/15/2025, 11:07 AM	Received
Four Presidents	2319	\$1,057.49	10/10/2025, 10:18 AM	Received
Four Presidents	2293	\$728.32	10/9/2025, 10:05 AM	Voided
Four Presidents	2288	\$7.00	10/2/2025, 2:40 PM	Voided
Four Presidents	2287	\$5.92	10/2/2025, 2:34 PM	Voided
Four Presidents	2283	\$7.00	10/2/2025, 2:31 PM	Voided
Four Presidents	2283	\$7.00	10/2/2025, 2:29 PM	Voided
Four Presidents	2281	\$7.00	10/2/2025, 2:22 PM	Voided
Four Presidents	2257	\$13.10	10/2/2025, 2:11 PM	Voided
Four Presidents	2256	\$13.10	10/2/2025, 2:07 PM	Voided
Four Presidents	2245	\$13.10	10/2/2025, 1:23 PM	Voided
Four Presidents	2205	\$13.10	8/4/2025, 3:43 PM	Voided
Four Presidents	2183	\$5.00	8/31/2025, 12:00 AM	Received
Four Presidents	2138	\$6.00	8/26/2025, 5:07 AM	Received
Four Presidents	2137	\$5.00	8/26/2025, 5:06 AM	Received
Four Presidents	2138	\$1.50	8/26/2025, 5:05 AM	Received
Four Presidents	2085	\$37.00	8/18/2025, 11:13 AM	Received
Four Presidents	2084	\$128.92	8/18/2025, 4:21 AM	Received
Four Presidents	2075	\$5.00	8/13/2025, 1:31 PM	Received
Four Presidents	2074	\$5.00	8/13/2025, 1:22 PM	Received
Four Presidents	2073	\$21.23	8/13/2025, 1:21 PM	Received
Four Presidents	2005	\$237.05	8/7/2025, 3:18 PM	Received
Four Presidents	2004	\$57.84	8/7/2025, 3:12 PM	Received
Four Presidents	2003	\$27.16	8/7/2025, 2:54 PM	Received
Four Presidents	2001	\$8.25	8/7/2025, 2:20 PM	Received
Four Presidents	1999	\$38.20	8/7/2025, 2:15 PM	Received
Four Presidents	1987	\$62.31	8/7/2025, 1:55 PM	Received
Four Presidents	1970	\$419.10	8/7/2025, 1:44 PM	Received
Four Presidents	1969	\$11,399.00	8/7/2025, 1:40 PM	Received

16. Click "Export"

Next, click "Export".

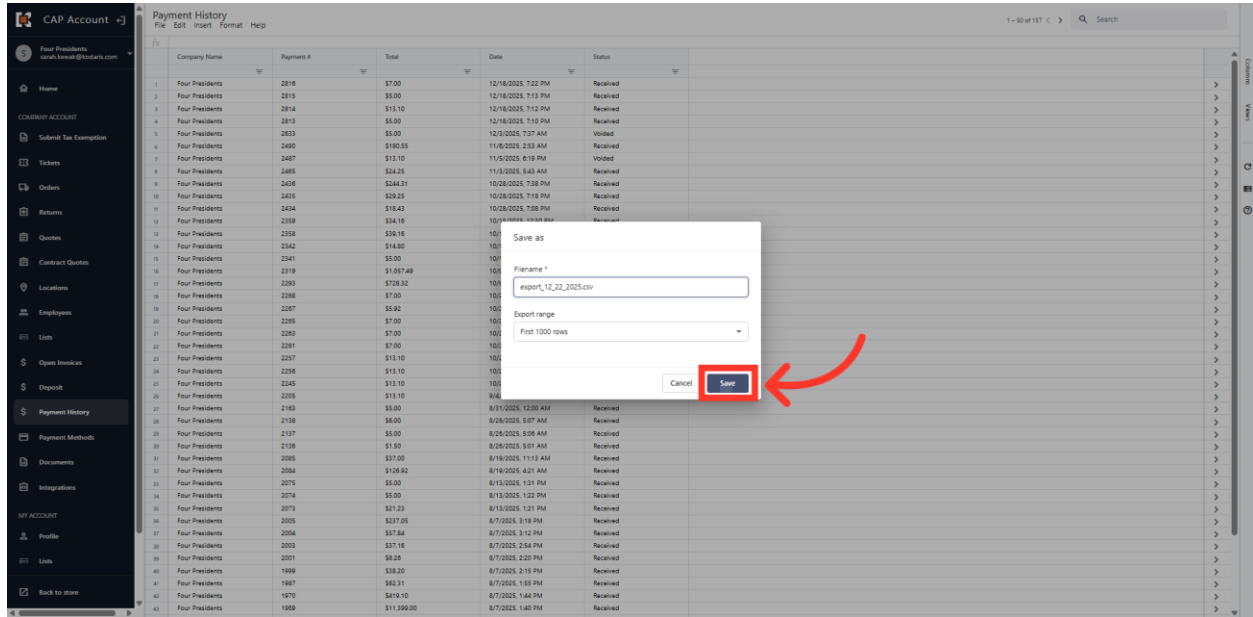


The screenshot shows the CAP Account interface. The left sidebar contains navigation options: Home, COMPANY ACCOUNT, Subsidy Tax Exemptions, Tickets, Orders, Returns, Quotes, Contract Quotes, Locations, Employees, Lists, Open Invoices, Deposit, Payment History (highlighted), Payment Methods, Documents, Integrations, MY ACCOUNT, Profile, and Back to store. The main area displays a table titled 'Payment History' with columns: Company Name, Invoice #, Total, Date, and Status. A red box highlights the 'Export' button in the top navigation bar, and a red arrow points to it.

Company Name	Invoice #	Total	Date	Status
Four Presidents	2816	\$7.00	12/18/2025, 1:22 PM	Received
Four Presidents	2815	\$5.00	12/18/2025, 1:18 PM	Received
Four Presidents	2814	\$13.10	12/18/2025, 1:12 PM	Received
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Four Presidents	2435	\$29.25	10/28/2025, 7:18 PM	Received
Four Presidents	2434	\$18.43	10/28/2025, 7:08 PM	Received
Four Presidents	2339	\$34.16	10/15/2025, 12:30 PM	Received
Four Presidents	2338	\$39.16	10/15/2025, 12:30 PM	Received
Four Presidents	2342	\$14.80	10/15/2025, 11:10 AM	Received
Four Presidents	2341	\$5.00	10/15/2025, 11:07 AM	Received
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Four Presidents	2283	\$7.00	10/2/2025, 2:29 PM	Voided
Four Presidents	2281	\$7.00	10/2/2025, 2:22 PM	Voided
Four Presidents	2257	\$13.10	10/2/2025, 2:11 PM	Voided
Four Presidents	2256	\$13.10	10/2/2025, 2:07 PM	Voided
Four Presidents	2245	\$13.10	10/2/2025, 1:23 PM	Voided
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Four Presidents	2138	\$1.50	8/26/2025, 5:05 AM	Received
Four Presidents	2085	\$37.00	8/18/2025, 11:13 AM	Received
Four Presidents	2084	\$128.92	8/18/2025, 4:21 AM	Received
Four Presidents	2075	\$5.00	8/13/2025, 1:31 PM	Received
Four Presidents	2074	\$5.00	8/13/2025, 1:22 PM	Received
Four Presidents	2073	\$21.23	8/13/2025, 1:21 PM	Received
Four Presidents	2005	\$237.05	8/7/2025, 3:18 PM	Received
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Four Presidents	2003	\$27.16	8/7/2025, 2:54 PM	Received
Four Presidents	2001	\$8.25	8/7/2025, 2:20 PM	Received
Four Presidents	1999	\$38.20	8/7/2025, 2:15 PM	Received
Four Presidents	1987	\$62.31	8/7/2025, 1:55 PM	Received
Four Presidents	1970	\$419.10	8/7/2025, 1:44 PM	Received
Four Presidents	1969	\$11,399.00	8/7/2025, 1:40 PM	Received

17. Save As Dialog Box

In the "Save As" dialog box, enter a File name and click "Save" to save the export to your computer.



18. Payment History View

The file has been saved and you are returned to the Payment History dashboard.

