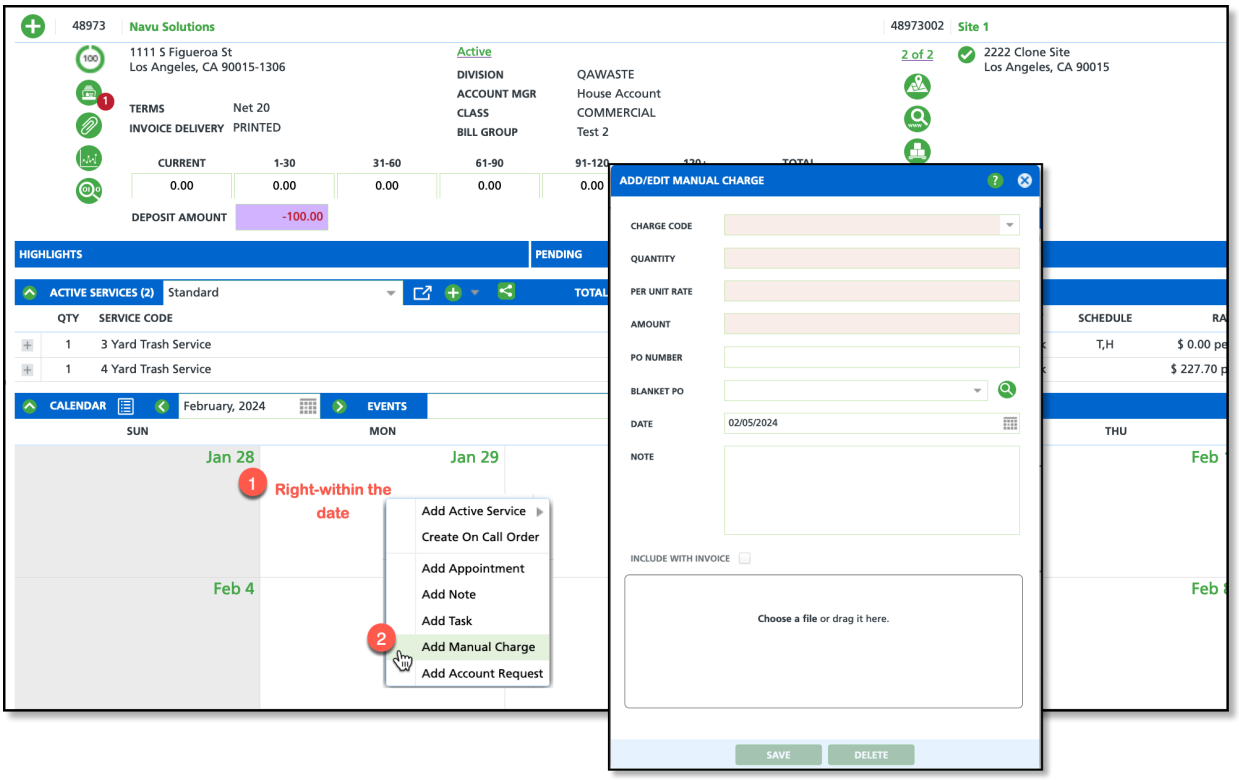
Add Manual Charge

Last Modified on 06/25/2026 7:26 am PDT

Pathway: Accounts > Search > Accounts

Manual charges provide flexibility to apply additional fees to a site for reasons such as special requests, extra materials, and miscellaneous expenses.



Permissions

The following permissions are required to add a manual charge to a site:

Permission ID	Permission Name
5	View Account
6	View Site
248	Add Manual Charge
377	Add Manual Charge with Negative Amount **This is a form of crediting an account instead of adjusting or crediting an invoice.*

Field Descriptions

Field	Description
Charge Code	Drop down selection of available charge codes.
Quantity	The amount for charge codes involving equipment.
Per Unit Rate	The rate the customer will be charged for the service.

Field	Description
Amount	Calculated as Quantity x Rate.
PO Number	Field to enter a purchase order to which the manual charge applies.
Blanket PO	Drop down selection of available blanket purchase orders to which the charge can be linked.
Date	The date the charge was applied.
Note	Additional notes regarding the charge. Notes entered here will display on the invoice.
File/Image Upload	Option to upload an image or file.

Create A Manual Charge

1. Right-click on the **calendar date** the charge applies.
2. Select **Add Manual Charge** from the popup that displays.
3. From the Add/Edit Manual Charge popup editor, minimally complete all required fields.
4. Select Save when finished.

Locations Manual Charges Display

Manual charges display in the pending items until included included on an invoice. Charges cannot be edited or deleted once the account has been billed.

