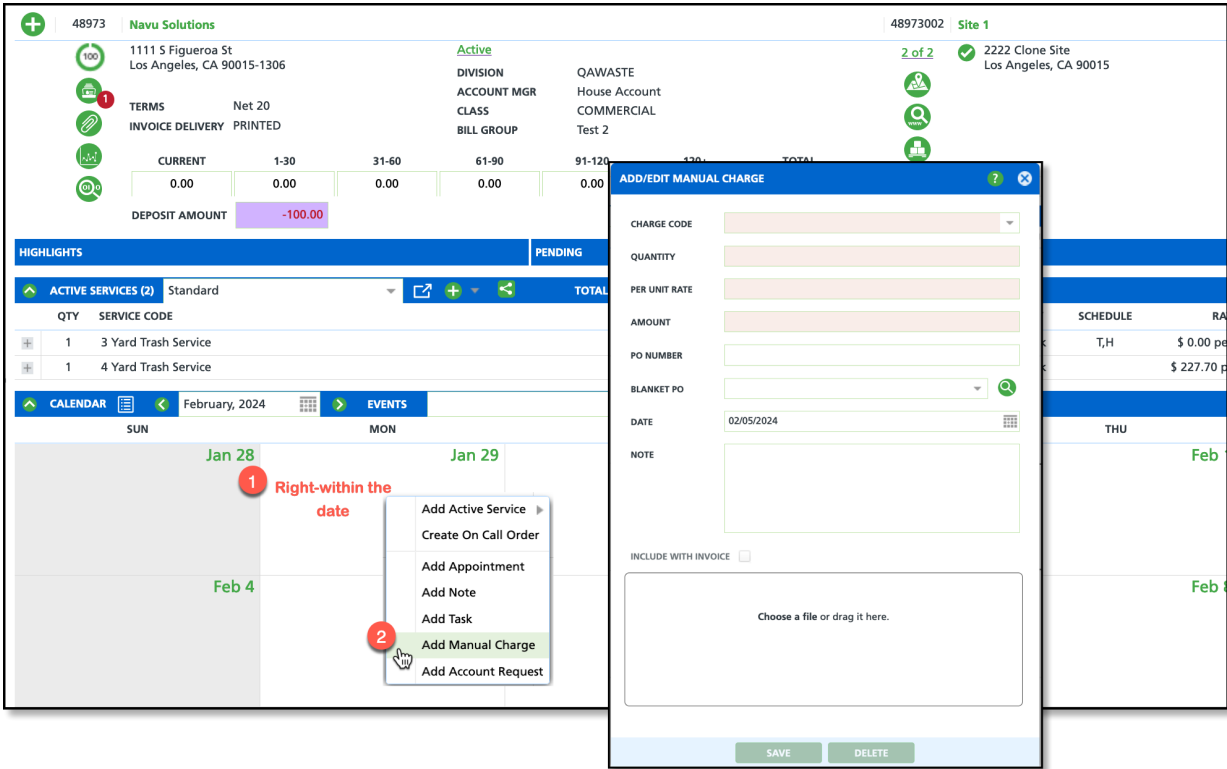


Add Manual Charge

Last Modified on 02/15/2024 9:31 am EST

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

Field Descriptions

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

Field	Description
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 Charge Codes Display

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

The screenshot displays a software interface for account management. At the top, two accounts are shown: Cascade Orthopedics (123 West Elm St, Houston, TX 54020-4042) and Osseo Clinic (1111 Churchill St W, Houston, TX 55082). Below this is a balance summary table:

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
187.33	0.00	0.00	0.00	0.00	0.00	187.33

Below the table is a 'PENDING' section with the following items:

ID	Description	Staff	Date	Amount
4143	Confirm appointment	Alliena Somers	08/02/2022	
1195	Vacation Hold Services	Alexis Garza	05/20/2022 1:29 pm	
23616	AR Adjustment	Alliena Somers	06/28/2022	Amount: \$25.00

The bottom section shows a 'CALENDAR' view for July 2022. A red box highlights the 'AR Adjustment' entry on June 27th. The calendar also shows 'Billing/AR question' on June 26th.