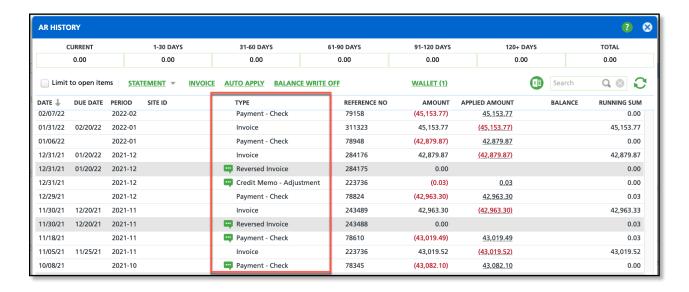
AR History Account Transactions

Last Modified on 07/19/2024 3:00 pm EDT

Pathway: Accounts > Search > Accounts screen

This article explains how to access account transactions by right-clicking within a line item's row. The available options vary depending on the line item type: **Invoice**, **Payment and Adjustment**.



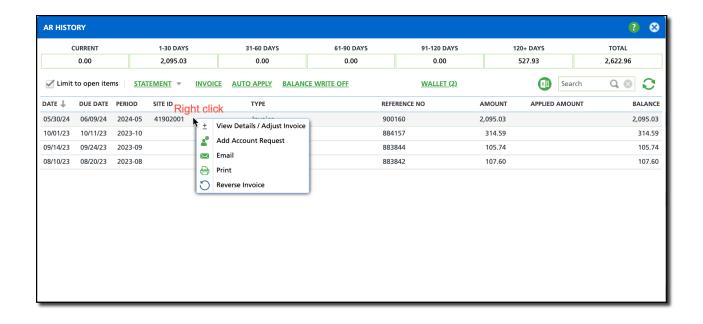
Permissions

The following permissions are required to view and use features in the AR History screen:

Permission ID	Permission Name
5	View Account
6	View Site
41	View AR History

Type - Invoice

If the line item's Type is 'Invoice,' the following options display upon right click.

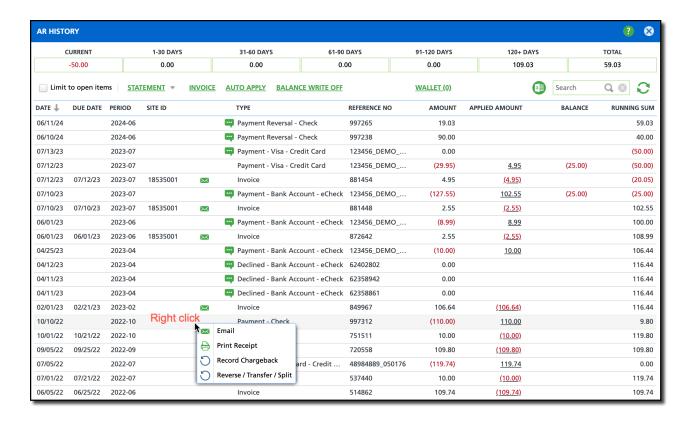


Available Right Click Options

Right Click Option	Description
View Details / Adjust Invoice	Select this option to reduce the invoice amount or credit the entire invoice.
Add Account Request	Select to create a customer request and assign it to yourself, or another user.
Email	Select to email the invoice to a contact on the account. Invoices can be emailed as either a URL link, or as a PDF attachment.
Print	Select to print the selected invoice.
Reverse	Select to reverse the invoice record. This can only be done to the most recent invoice, or period that is currently open.

Type - Payment

If the line item's Type is 'Payment,' the following options display upon right click.

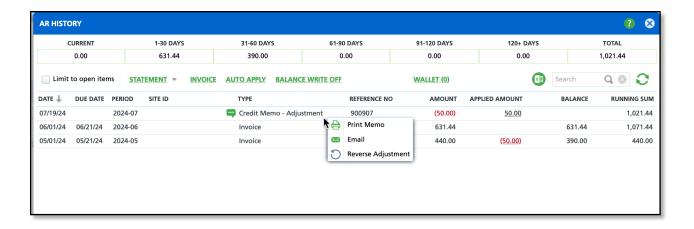


Available Right Click Options

Option	Description			
•	Description			
Payment - Credit Card				
Email	Select to email a copy of the payment receipt to an account contact.			
Print Receipt	Select to print a copy of the receipt.			
December of	In the event the customer's payment was reversed by the financial institution,			
Record Chargeback	record the chargeback using the Record Chargeback tool.			
	The Void Payment option is available for unsettled Credit Card payments usually			
Void Payment	less than 24 hours old. If the payment was settled (processed by the bank) this			
•	option will not display.			
Payment - Check & eCheck (ACH)				
Email	Select to email a copy of the payment receipt to an account contact.			
Print Receipt	Select to print a copy of the receipt.			
Decoud Chargehook	In the event the customer's payment was reversed by the financial institution,			
Record Chargeback	record the chargeback using the Record Chargeback tool.			
	Reverse: Option to reverse the payment for insufficient funds.			
	• Transfer: Option to transfer the payment to another account. If selected, a			
	search field displays to search for the account the payment will be			
Reverse/Transfer/Split	transferred to.			
	 Split: Option to split the payment between accounts. If selected, a search 			
	field displays to search for the account the payment will be split between.			

Type - Adjustment

If the line item's Type is 'Adjustment,' the following options display upon right click.



Available Right Click Options

Option	Description
Print Memo	Option to print the credit memo.
Email	Select to email a copy of the credit memo to an account contact.
Reverse Adjustment	Option to reverse an adjustment that was applied to the invoice.