Service Record - Payments Tab

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Pathway: *Accounts > Search: Work Orders > Payments (tab)*

The Payments tab on the Service Record screen enables direct application of payments for services or inbound scale loads. As payments are added, the combined total will display on the Payments tab header.

> ℹ️ A separate AR Payment batch is created for every payment for every work order (except for credit card payments that will go to the credit card batch for the day).

Permissions

The following permissions are required to access and add payments to a service record:

Permission ID	Permission Name
5	View Account
6	View Site

Field Descriptions

Field	Description
Payments Tab	
Description	References the Payment type that was used.
Batch #	Displays the ID number of the AR Payment batch the payment is associated with.
Batch Date	Displays the date the batch was created.

Status	Displays the status of the AR Payment batch.
Reference	Displays the reference number that was added with the payment. If a check was used, this may be the check number.
Amount	Displays the amount the payment is for.
Note	Displays any notes added with the payment.
Add Payment	
Type	Identifies the payment type that was received. Supports the following payment types: • Cash • Check • New or existing credit card • ACH
Payment Amount	The payment amount that was received or will be processed.
Note	Option to add additional details with the payment that will be visible on the service record.

Add a Payment to a Service Record

1. Select the **Payments** tab from the service record screen.
2. Click the **green '+'** icon to open the 'Add Payment' popup window.
3. Complete the following required fields to process the payment:
   - Select the payment **Type** being used to pay.
   - Enter the **Payment Amount** that was received.
4. Click **Save** and the payment will be added to the service record.

Related Articles

AR Payment Batch