

Payment Batch - Default Payment Type Added (15603) [Enhancement]

Last Modified on 08/09/2023 4:14 pm EDT

A new "Default Payment Type" feature has been added to Payment Batch. By selecting a default payment type, new payments for the batch will default to the type selected. If a default is not selected for the batch, the user must select the type each time a payment is added.

This feature defaults to null/blank.

The screenshot displays the 'BATCH - 11017 DIVISION - DAYTON' interface. At the top, there are fields for DATE (08/09/2023), BANK ACCOUNT (TBD), AMOUNT (\$ 0.00), COUNT (0), and STATUS (Open). Below these are fields for NOTE, CREATED BY (Aliena Somers - 08/09/2023 3:05 pm), and POSTED BY. A search bar for 'Account/ Site' is present with a note: 'Double click on search result to add payment'. A yellow dropdown menu labeled 'DEFAULT PAYMENT TYPE' is set to 'ACH'. Below this is a table with columns: ACCOUNT ID, STATUS, BALANCE, ACCOUNT NAME, SITE ID, SITE NAME, and PREVIOUS ID. At the bottom, there is a 'SORT' dropdown set to 'Entry Order ↓' and a search bar for 'Payment in Batch'. A table below shows a payment entry with columns: ACCOUNT ID (48954), NAME (Test -Leads Ana...), STATUS (Active), BALANCE (\$ 25.00), TYPE (ACH), REFERENCE (1234), AMOUNT, APPLIED DEPOSIT AMOUNT (0.00), and AUTO APPLY (checkboxes). A red arrow points from the 'DEFAULT PAYMENT TYPE' dropdown to the 'TYPE' column of the payment entry.

Pathway: Accounting > AR Payment Batch