Payment Processsing Workflows: Core, Portal and Online Ordering

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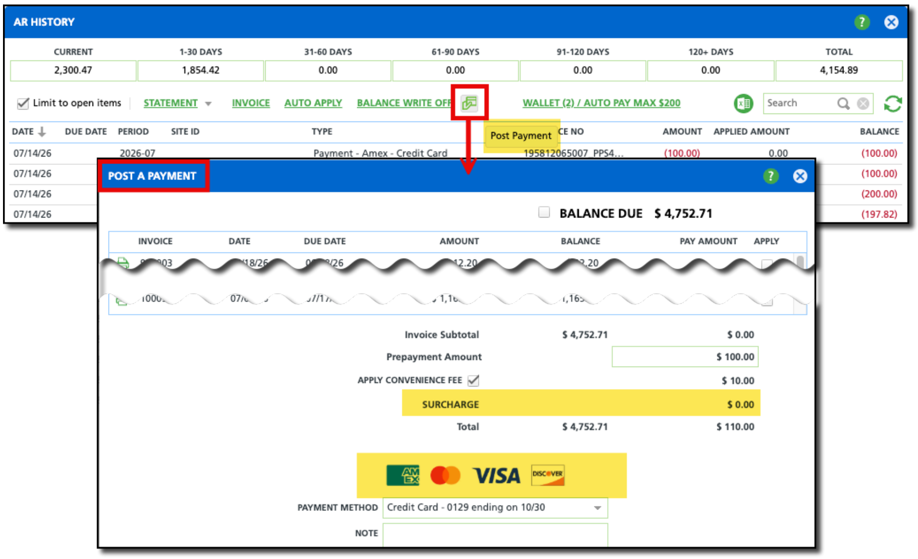
Managing payments in Navusoft is highly flexible. To help you find the right method for your needs, this article maps out the payment processing workflows across the system: several in Core, a few in the Customer Portal, and 1 via Online Ordering. Use this quick reference to explore each workflow.

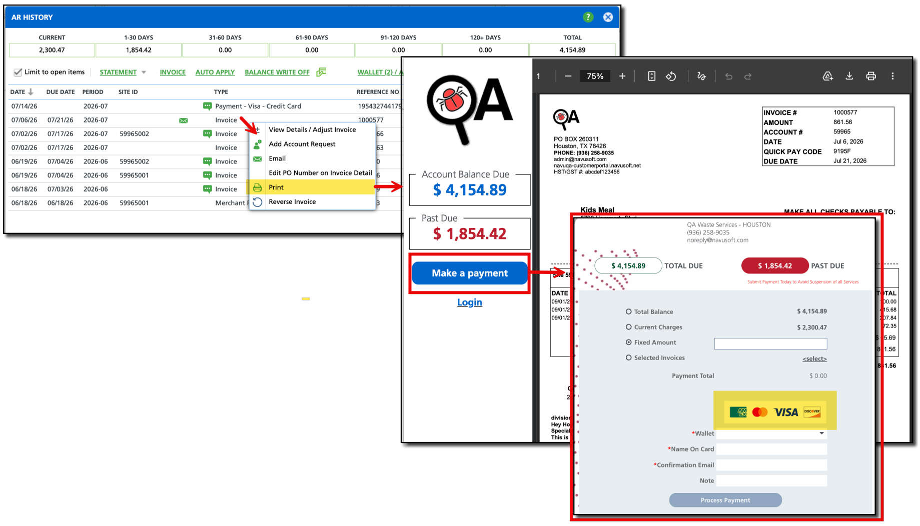
Core Payment Workflows

Manual Pay - Post a Payment



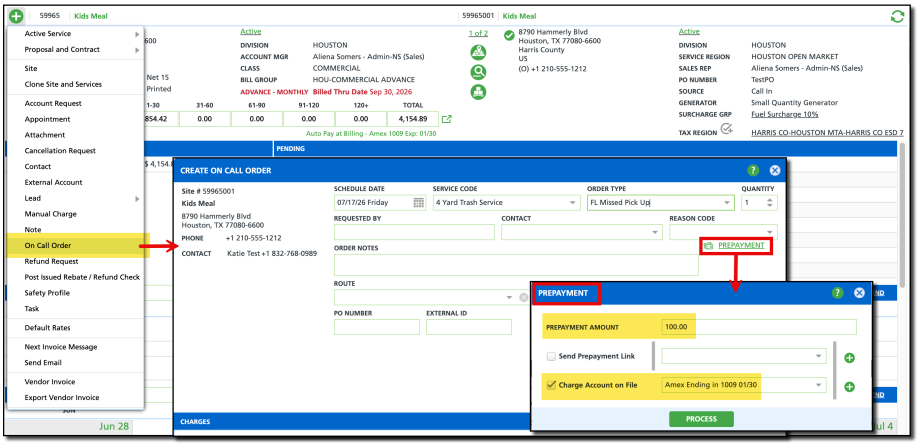
Pathway: *Customer Account > AR History > Wallet > **Post a Payment***

Preview Invoice - Make a Payment



Pathway: *View Invoice (from AR History or email link) > **Make a Payment***

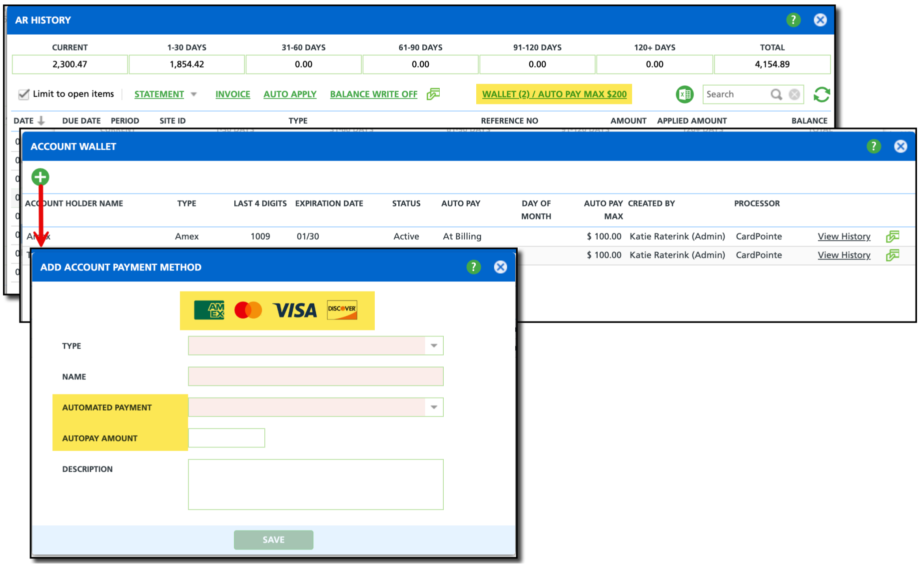
On-Call Prepayments



Pathway: *Customer service > Create On-Call > PrePayment (via customer service or via email link)*

Auto Pay

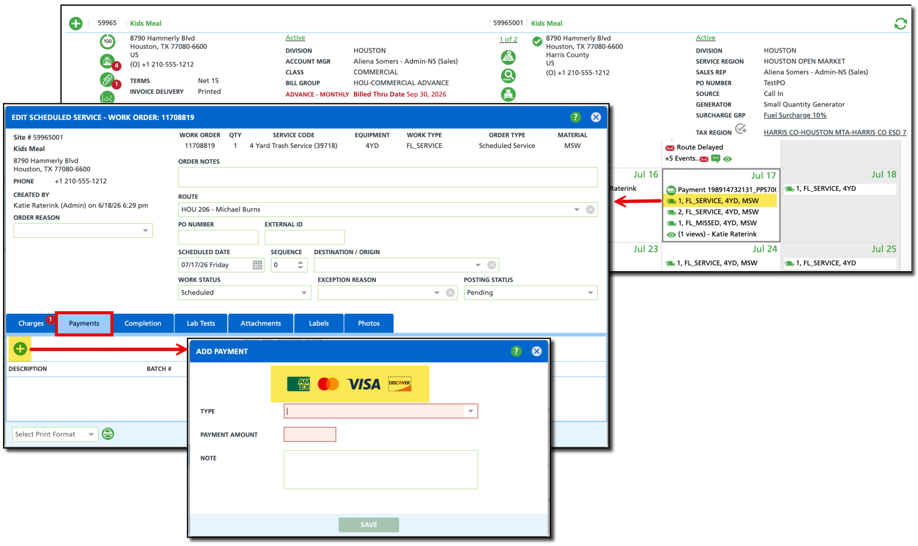
- at Billing
- on Scheduled Day



Pathway: *Customer Service > AR History > Wallet > Add/Edit Account Payment Method*

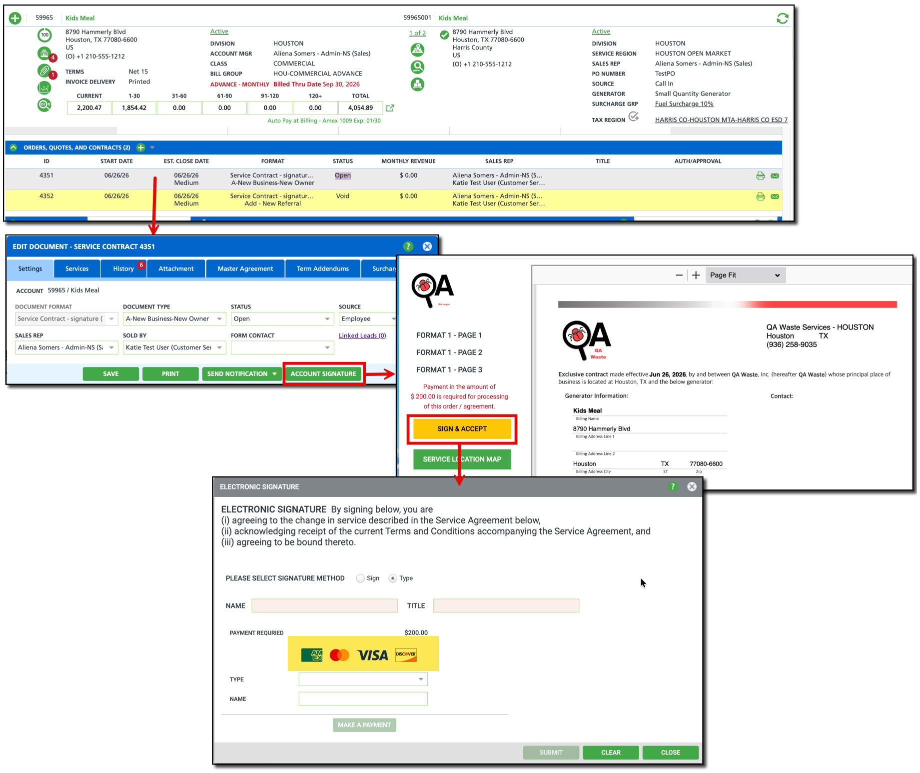
Note: User Interface to the payment process; the fees are calculated and charged through the auto pay process for each card setup for Auto Pay in a customer's wallet.

Work Order Payment



Pathway: *Schedule Service - Work Order > Payments tab > Add a payment (+)*

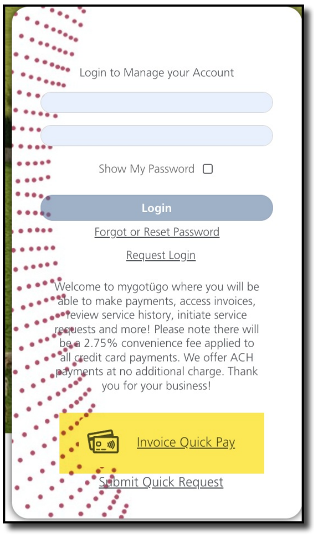
Service Agreement / Proposal Payments



Pathway: *Customer Account > Orders, Quotes, and Contracts section > Select Open agreement or proposal > Account Signature*

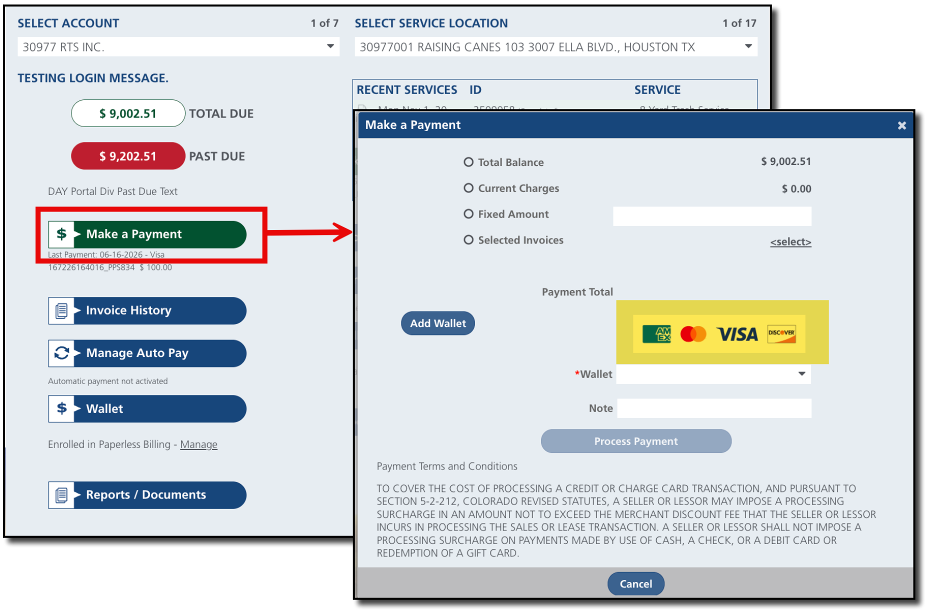
Customer Portal Payment Workflows

Invoice Quick Pay



Pathway: *Customer Portal > Invoice Quick Pay*

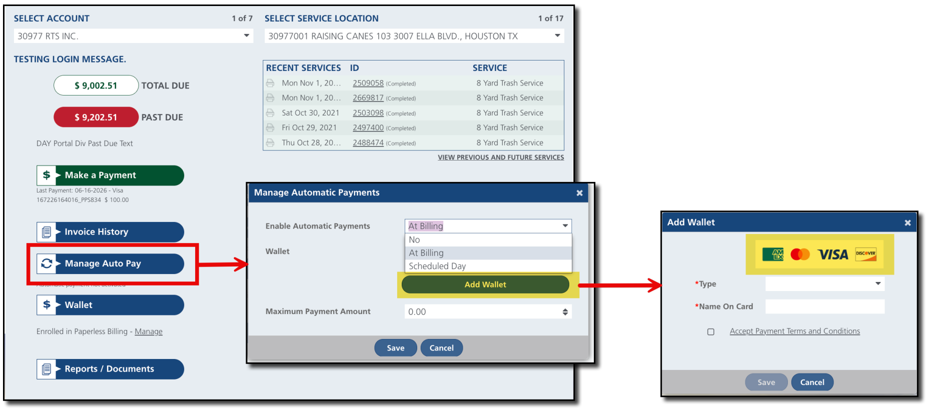
Make a Payment



Pathway: *Customer Portal > Login > Select Account > Make a Payment*

Manage Auto Pay

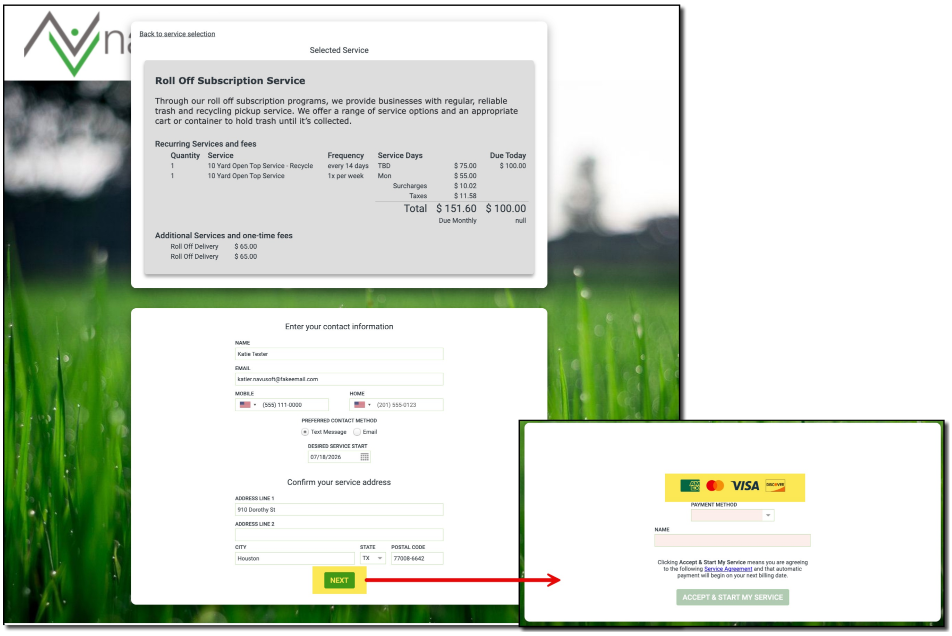
-
- at Billing
- on Scheduled Day



Pathway: *Customer Portal > Login > Manage Auto Pay*

Online Order Payment Workflow

Make a Payment



Pathway: *Online Order portal > Select Service > Make a Payment*