

Last Modified on 07/17/2026 10:50 am PDT

Core Payment Workflows

AR HISTORY

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
2,300.47	1,854.42	0.00	0.00	0.00	0.00	4,154.89

☒ Limit to open items |
 STATEMENT ▾ |
 INVOICE |
 AUTO APPLY |
 BALANCE WRITE OFF |
 WALLET (2) / AUTO PAY MAX \$200

SEARCH

DATE ↓	DUE DATE	PERIOD	SITE ID	TYPE	CE NO	AMOUNT	APPLIED AMOUNT	BALANCE
07/14/26	2026-07			Payment - Amex - Credit Card	195812065007 PPS4...	(100.00)	0.00	(100.00)
07/14/26								(100.00)
07/14/26								(200.00)
07/14/26								(197.82)

POST A PAYMENT

☐ **BALANCE DUE \$ 4,752.71**

INVOICE	DATE	DUE DATE	AMOUNT	BALANCE	PAY AMOUNT	APPLY
1000000003	07/14/26	07/14/26	\$2.20	\$2.20		
1000000000	07/14/26	07/14/26	\$1,160.00	\$1,160.00		

Invoice Subtotal \$ 4,752.71 \$ 0.00
 Prepayment Amount \$ 100.00
 APPLY CONVENIENCE FEE ☒ \$ 10.00
 SURCHARGE \$ 0.00
 Total \$ 4,752.71 \$ 110.00

PAYMENT METHOD Credit Card - 0129 ending on 10/30

NOTE

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

The screenshot displays the QuickBooks Online interface with three main components:

- AR HISTORY Table:** A table listing invoices with columns for DATE, DUE DATE, PERIOD, SITE ID, TYPE, and REFERENCE NO. The table shows several invoices, with the first one (07/14/26) highlighted in blue. A red arrow points from this invoice to the 'Account Balance Due' summary.
- Account Balance Due Summary:** A summary card showing the total balance due of \$4,154.89. A red box highlights the 'Make a payment' button, and a red arrow points from this button to the 'Make a payment' dialog box.
- Make a payment Dialog Box:** A dialog box for making a payment. It shows the total due of \$4,154.89 and the past due amount of \$1,854.82. The 'Payment Total' is \$0.00. The dialog box includes fields for 'Name On Card', 'Confirmation Email', and 'Note'. A red box highlights the 'Payment Total' field, and a red arrow points from this field to the 'Payment Total' field in the 'Make a payment' dialog box.

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

EDIT SCHEDULED SERVICE - WORK ORDER: 11708819

Site # 5996501
Kids Meal
8790 Hammerly Blvd
Houston, TX 77060-6600
PHONE: +1 210-555-1212
CREATED BY: Katie Raterink (Admin) on 6/18/26 6:29 pm
ORDER REASON: [Dropdown]

Payments | Charges | Completion | Lab Tests | Attachments | Labels | Photos

ADD PAYMENT

DESCRIPTION: [Dropdown] BATCH # [Dropdown]

TYPE: [Dropdown]

PAYMENT AMOUNT: [Text Box]

NOTE: [Text Area]

SAVE

Calendar: Jul 16, Jul 17, Jul 18, Jul 23, Jul 24, Jul 25

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

Service Agreement / Proposal Payments

ORDERS, QUOTES, AND CONTRACTS (2)

ID	START DATE	EST. CLOSE DATE	FORMAT	STATUS	MONTHLY REVENUE	SALES REP	TITLE	AUTH/APPROVAL
4351	06/26/26	06/26/26	Service Contract - signature...	Open	\$ 0.00	Allena Somers - Admin-NS (Sales)	Katie Test User (Customer Ser...	[Icons]
4352	06/26/26	06/26/26	Service Contract - signature...	Void	\$ 0.00	Allena Somers - Admin-NS (Sales)	Katie Test User (Customer Ser...	[Icons]

EDIT DOCUMENT - SERVICE CONTRACT 4351

Settings | Services | History | Attachment | Master Agreement | Term Addendum | Subcontract

ACCOUNT: 59965 / Kids Meal

DOCUMENT FORMAT: [Dropdown] DOCUMENT TYPE: [Dropdown] STATUS: [Dropdown] SOURCE: [Dropdown]

SALES REP: Allena Somers - Admin-NS (Sales) SOLD BY: Katie Test User (Customer Ser...) FORM CONTRACT: [Dropdown] LINKED LEADS: [Dropdown]

SAVE | PRINT | SEND NOTIFICATION | **SIGN & ACCEPT**

SIGN & ACCEPT

SERVICE LOCATION MAP

ELECTRONIC SIGNATURE

ELECTRONIC SIGNATURE: By signing below, you are
(i) agreeing to the change in service described in the Service Agreement below,
(ii) acknowledging receipt of the current Terms and Conditions accompanying the Service Agreement, and
(iii) agreeing to be bound thereto.

PLEASE SELECT SIGNATURE METHOD: ☐ Sign ☒ Type

NAME: [Text Box] TITLE: [Text Box]

PAYMENT REQUIRED: \$200.00

TYPE: [Dropdown]

NAME: [Text Box]

MAKE A PAYMENT

SUBMIT | CLEAR | CLOSE

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

Customer Portal Payment Workflows

Invoice Quick Pay

Login to Manage your Account

Show My Password ☐

Login

[Forgot or Reset Password](#)

[Request Login](#)

Welcome to mygotogo where you will be able to make payments, access invoices, review service history, initiate service requests and more! Please note there will be a 2.75% convenience fee applied to all credit card payments. We offer ACH payments at no additional charge. Thank you for your business!

 Invoice Quick Pay

[Submit Quick Request](#)

Pathway: Customer Portal > Invoice Quick Pay

Make a Payment

SELECT ACCOUNT 1 of 7

30977 RTS INC.

TESTING LOGIN MESSAGE.

\$ 9,002.51 TOTAL DUE

\$ 9,202.51 PAST DUE

DAY Portal Div Past Due Text

 Make a Payment

Last Payment: 06-16-2026 - Visa
167226164016_PP5884 \$ 100.00

[Invoice History](#)

[Manage Auto Pay](#)

Automatic payment not activated

[Wallet](#)

Enrolled in Paperless Billing - [Manage](#)

[Reports / Documents](#)

SELECT SERVICE LOCATION 1 of 17

30977001 RAISING CANES 103 3007 ELLA BLVD., HOUSTON TX

RECENT SERVICES

ID	SERVICE
30977001	RAISING CANES 103 3007 ELLA BLVD., HOUSTON TX

Make a Payment

☐ Total Balance \$ 9,002.51

☐ Current Charges \$ 0.00

☐ Fixed Amount

☐ Selected Invoices <select>

Payment Total

[Add Wallet](#)



*Wallet

Note

[Process Payment](#)

Payment Terms and Conditions

TO COVER THE COST OF PROCESSING A CREDIT OR CHARGE CARD TRANSACTION, AND PURSUANT TO SECTION 5-2-212, COLORADO REVISED STATUTES, A SELLER OR LESSOR MAY IMPOSE A PROCESSING SURCHARGE IN AN AMOUNT NOT TO EXCEED THE MERCHANT DISCOUNT FEE THAT THE SELLER OR LESSOR INCURS IN PROCESSING THE SALES OR LEASE TRANSACTION. A SELLER OR LESSOR SHALL NOT IMPOSE A PROCESSING SURCHARGE ON PAYMENTS MADE BY USE OF CASH, A CHECK, OR A DEBIT CARD OR REDEMPTION OF A GIFT CARD.

[Cancel](#)

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

Manage Auto Pay

-
- at Billing
- on Scheduled Day

The screenshot shows the 'Manage Automatic Payments' dialog box with the following fields:

- Enable Automatic Payments: ☐ (checked)
- Wallet:
- Maximum Payment Amount:

The 'Add Wallet' dialog box shows the following fields:

- *Type:
- *Name On Card:
- ☐ Accept Payment Terms and Conditions

Pathway: Customer Portal > Login > [Manage Auto Pay](#)

Online Order Payment Workflow

Make a Payment

The screenshot shows the 'Roll Off Subscription Service' details with the following table:

Quantity	Service	Frequency	Service Days	Due Today
1	10 Yard Open Top Service - Recycle	every 14 days	TBD	\$ 75.00
1	10 Yard Open Top Service	1x per week	Mon	\$ 55.00
Burcharges				\$ 10.00
Taxes				\$ 11.58
Total				\$ 151.60
Due Monthly				Roll

The 'Enter your contact information' section includes fields for NAME, EMAIL, MOBILE, and HOME, along with a 'PREFERRED CONTACT METHOD' dropdown and a 'SEND SERVICE START' button.

The 'Confirm your service address' section includes fields for ADDRESS LINE 1, ADDRESS LINE 2, CITY, STATE, and POSTAL CODE, along with a 'NEXT' button.

The 'PAYMENT METHOD' section shows a dropdown menu with 'VISA' selected and a 'NAME' field.

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