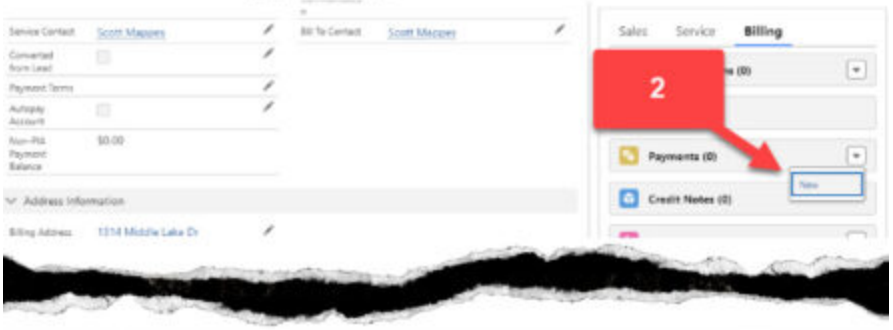
QRG PAY.5 – Creating a Cash, Check, or Money Order Payment

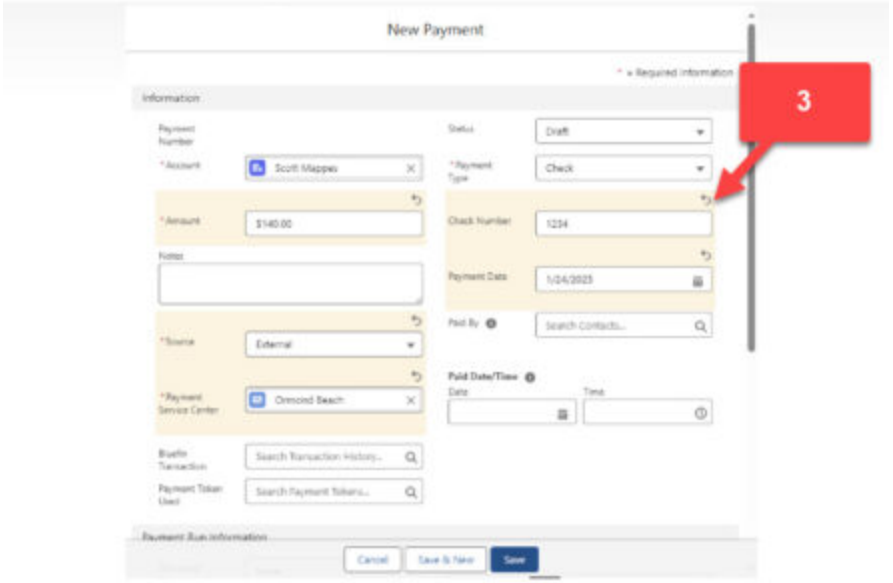
Quick Reference Guides · https://milo.masseyservices.com/docs/qrg-pay-5-creating-a-cash-check-or-money-order-payment/

Creating a Cash, Check, or Money Order Payment

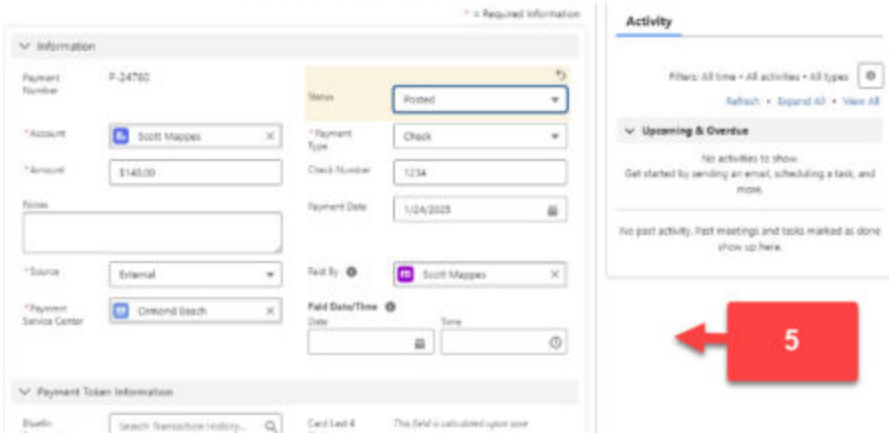
1. From the Account click on the Billing Tab
2. Using the dropdown arrow on the payment object, select New
3. Ensure the payment is in Draft status. Enter the amount of the cash, check, or money order payment. Enter the check number if applicable. Enter the date you are scanning the check or taking the cash to the bank and posting the payment. Select External as the Source. Type the Service Center in the Payment Service Center Box. Click Save.
4. Navigate to the payment that was just created and edit the payment record by clicking on the pencil.
5. Verify the payment information is accurate. Change the status from Draft to Posted and click Save.


Service Contact
Scott Mappes
Bill To Contact
Scott Mappes
Converted from Lead
Payment Terms
Autopay Account
Non-PIA
$0.00
Sales
Service
Billing
1
View All


Service Contact
Scott Mappes
Bill To Contact
Scott Mappes
Converted from Lead
Payment Terms
Autopay Account
Non-PIA Payment Balance
$0.00
Address Information
Billing Address
1314 Middle Lake Dr
Sales
Service
Billing
2
Payments (0)
Credit Notes (0)
New


New Payment
* = Required Information
Information
Payment Number
Status
Draft
*Account
Scott Mappes
*Payment Type
Check
*Amount
$140.00
Check Number
1234
Notes
Payment Date
1/24/2023
*Source
External
Paid By
Search contacts...
*Payment Service Center
Ormond Beach
Paid Date/Time
Date
Time
Bluefin Transaction
Search Transaction History...
Payment Token Used
Search Payment Tokens...
Payment Run Information
Cancel
Save & New
Save
3


Related
Details
Information
Payment Number
P-24760
Status
Draft
Account
Scott Mappes
Payment Type
Check
Amount
$140.00
Check Number
1234
Activity
4
Filters: All time • All activities • All types
Refresh • Expand All • View All


* = Required Information
Information
Payment Number
P-24760
Status
Posted
*Account
Scott Mappes
*Payment Type
Check
*Amount
$140.00
Check Number
1234
Notes
Payment Date
1/24/2023
*Source
External
Paid By
Scott Mappes
*Payment Service Center
Ormond Beach
Paid Date/Time
Date
Time
Payment Token Information
Bluefin
Search Transaction History...
Card Last 4
This field is calculated upon save
Activity
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.
5

Embedded media: https://milo.masseyservices.com/wp-content/uploads/2025/10/QRG-PAY.5-Creating-a-Cash-Check-or-Money-Order-Payment.pdf

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