QRG PAY.5 – 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.

Related   **Details**

⌄ Information

Payment Number	P-24760		Status	Draft	✏
Account	Scott Mappes	✏	Payment Type	Check	✏
Amount	$140.00	✏	Check Number	1234	✏
		✏		1/24/2025	✏

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Activity

Filters: All time • All activities • All types ⚙

Refresh • Expand All • View All

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* = Required Information

⌄ Information

Payment Number	P-24760			↺
*Account	🗃 Scott Mappes	✕	Status	Posted ▼
*Amount	$140.00		*Payment Type	Check ▼
Notes			Check Number	1234
			Payment Date	1/24/2025 📅
*Source	External ▼		Paid By ⓘ	🟪 Scott Mappes ✕
*Payment Service Center	🗺 Ormond Beach	✕	**Paid Date/Time** ⓘ	
			Date	Time
			📅	🕐

⌄ Payment Token Information

| Bluefin Transaction | Search Transaction History... 🔍 | Card Last 4 Digits | This field is calculated upon save |
| Payment Token Used | Search Payment Token | | The field is calculated upon save |

Cancel   **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.

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