

Received on Account (Point of Sale)

Once your customers receive a statement, they know they have a payment to make.

If your Point of Sale system is set up to handle it, you can process the charge payment using Point of Sale.

Make sure your cursor is in the Customer field and select ROA from the ribbon menu.

Notice that the transaction type Received on Account now appears in the upper left side of your Point of Sale screen, directly under the ribbon menu.

Enter the customer you wish to post a payment for.

If you're using jobs, select the right job using the drop-down menu from the job field.

Now that you've selected your customer, your cursor moves to the Payment field.

Enter the payment amount and any discount or reference if needed.

You can also enter notes while posting the payment. This can help you track and manage your A/R accounts.

To add a note, select the A/R Note button on the ribbon menu, and enter your note in the dialog box that opens.

There is no limit to the length of the note, so add as much information as you need. Choose OK when you're finished.

Eagle records the note, who added it, and the date and time, creating a permanent link between the note and the document.

Press Enter to post the payment.

Keep in mind, you can't change a payment, but you can void the line if you've made a mistake in posting the payment!

Select Total KPad and then enter the tender type and amount.

The transaction completes, and you can print a payment receipt for the customer.

Eagle adds the money collected for the payment to the register totals for the day.

However, if the account is an open item-type A/R account, the system posts the payment as an Unapplied payment to the account.

Later, it gets processed in back office Received On Account where it's applied to specific invoices.

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