

Post a Payment

How to Record a Payment.

1. Enter a bill number and press enter. The program will display identifying information and the tax amounts. Verify these then press enter to move to the payment amount field.
 1. If this is a school bill that qualifies for installment payments there will be a box just below the box for the bill number to enter the installment number. Most taxpayers do not use this option so the program will skip past it. If you do need to enter an installment click into the box with the mouse, after entering the installment number the program will continue on to the Pmt Amt and fill in the amount of the selected installment.
2. The program will automatically fill in the correct amount for the selected payment period. If you received a different amount, enter the amount submitted and the program will record the difference as an adjustment. Press enter to move to the Check Number.
3. Enter the number of the check used to submit the payment; you may enter letters as well as numbers. This field is optional. If you enter just the letter C in the field for check number, the program will automatically fill in the word CASH. If you enter a plus sign (“+”) the previous check number will fill in automatically. Press enter to move to Paid By. If you enter the same check number for two or more consecutive payments, the running total paid by that check number will appear above the Check # box. This helps match the amount of a check used to pay multiple bills. The “Paid By” field will also pre-fill with the same name for that check # if you changed it on a previous bill with the same check # (this feature can be turned off in Settings).
4. The program will automatically fill in the name that appears on the bill or the Mortgage Company if there is one. If someone else has paid the bill, that can be recorded here. In addition, if you must make a refund you may enter an address here (up to 250 characters total) and it will appear on the Refund Report. Remember to use the F2 key if the name has not changed and you just want to add an address. Press enter to move to the Post Pmt button.
5. If all information is correct then press enter to record the payment and move automatically to the Bill Number. Start again at step 1 if there are additional payments to record.

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