Logging a Payment in Radius

This guide will cover:

- Logging a fee payment on an application invoice and updating the application status when an invoice is closed.
- How to re-open a closed invoice.

Step One

To log a fee payment for an application, use the global search to locate the contact record of the applicant.

REMEMBER: You can search for a contact by using one of the following fields:
- Email (recommended)
- First and last name
- Date of birth
- Mobile number
- Contact street

TIP: Adding an asterisk to the end of a value in the search bar can expand your search if you are unsure of what name a student may have in the system. For example, searching for Matt* will find all records that contain the word “Matt,” including Matthew or Matthews.

Step Two

Once you have located the contact record of the applicant, click then View to access their contact record.

If necessary, add the Applications related information tab. Click the Related Information drop-down then select Applications.

Contact

Applications

Required Information

First Name: Test_Bugs
Last Name: Bunny
**Step Three**

Click the Action button then select **View** to open the application record for which the invoice is applied.

**Step Four**

Within the application record, click the Related Information drop-down and select **Invoices** to add the new tab.

![Related Information dropdown with Invoices highlighted]

**Step Five**

On the Invoices tab, click the Action button then **Make Payment**.

![Invoices tab with Make Payment highlighted]
Step Six

A majority of the payment information fields will auto populate.

- **Payment Owner**: Leave with defaulted user name.
- **Program Name**: Leave with defaulted program name.
- **Iteration Name**: Leave with defaulted iteration name.
- **Invoice**: Leave with defaulted invoice number.
- **Application**: Leave with defaulted contact name.
- **Payment Amount**: Enter the payment amount.
- **Payment Received Date**: Enter the date and time (24 hour format).
- **Payment Type**: Select the desired payment type.

![Payment Information Screen]

Step Seven

Upon clicking **Save**, you will be directed to the invoice information page. If the total balance has been settled then the status of the invoice will automatically display as **Closed**.

**IMPORTANT:** When logging a payment and closing an invoice manually, the application status **will not** update automatically. (Online payments made through Radius Self Service will update the application status.)

Step Eight

To update the application status after closing an invoice, navigate back to the application by clicking on the hyperlink associated with the Application field in the Invoice Information section.

![Invoice Information Screen]
Step Nine
Click Edit.

Step Ten
Update the Application Status field from Applied – Fee Not Paid to Applied. (Note: If the invoice has not been paid in full, the status should remain as Applied – Fee Not Paid.)

Step Eleven
Click Save.

Note: A closed invoice may be re-opened by adding additional line items to the invoice. Follow these steps to re-open a closed invoice.

Step Twelve
If necessary, use steps one through four to locate the invoice.

On the Invoices tab, click the Action button associated with the invoice then click Edit.

Step Thirteen
Click the Add Line Item button next to program charges. A new line item will appear below the current item. If you need to add any miscellaneous charges, then click the Add Line Item button at the bottom of the screen.
Step Fourteen

Enter an Item Name and Description and then enter the quantity.

Step Fifteen

Enter an amount in the rate field. When you click off of the line item, the Sub Total, Grand Total and Balance Due will all adjust to reflect the current amounts for the invoice.

Step Sixteen

When you click save, you will be directed to the invoice summary where the Invoice Status will reflect as open. The Application status should be manually adjusted to reflect Applied – Fee Not Paid.