

A/R Transaction Codes

Contextual Information for Enhanced Customer Service



A/R Transaction Codes

Introduction

Transaction codes are used on invoices for many different things, from charges to notes, etc..

Problem Statement

I need a list of the available transaction codes in Summit Traffic.

Parameters

Use transaction codes for charges, payments, adjustments, etc.

Solution Overview

Review the list of transaction codes

Implementation: Step-by-step process to A/R Transaction Codes

1. Review the list of transactions codes

Charge - CHARGE
adj chg - ADJUST CHARGE
adj dsc - ADJUST FOR CASH DISCOUNT
adj w/o - ADJUST INVOICE AMOUNT TO WRITE OFF
a/e com - AE COMMISSION
adj aec - Adjust AE Commission
rep com - REP FIRM COMMISSION
adj rcm - ADJUST REP FIRM COMMISSION
agc com - AGENCY COMMISSION
adj acm - ADJUST AGENCY COMMISSION
fin chg - FINANCE CHARGE
adj fin - ADJUST FINANCE CHARGE
sls tax - SALES TAX
adj stx - ADJUST SALES TAX
trd crd - TRADE CREDIT
adj tcr - ADJUST TRADE CREDIT
payment - PAYMENT
adj pmt - ADJUST PAYMENT
svc chg - SERVICE CHARGE
adj svc - ADJUST SERVICE CHARGE
note - NOTE

Frequently Asked Questions

Question: How do I know which transaction type to use?

Answer: Most are self-explanatory. Use the adjustment for the item you are adjusting. Example: if you are adjusting a payment, use adjust payment, if you are adjusting a charge, use adjust charge, etc. Enter payments automatically uses the payment type.