

# 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.