

Make Payments on Multiple Cases with Payment Manager

Use **Payment Manager** to make a payment toward fees and/or deposits for multiple cases at one time.

1. Open the **Payment Manager** page.



TIP: You may need to add a menu item in order to access the page. See [Add Menu Items](#) in the Respond Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

2. Click **New Payments**.



NOTE: You can use deposits and escrow payments to pay fees using **Apply Deposits** and **Apply Escrow Payments**.

3. Click **Search By Query** and select a predefined query from the **Select Query** drop-down list.
4. Click **Load** to open the results.

The screenshot shows the 'Payment Manager' interface. At the top, there are tabs for 'NEW PAYMENTS', 'APPLY DEPOSITS', and 'APPLY ESCROW PAYMENTS'. The 'NEW PAYMENTS' tab is active. Below the tabs, there is a 'Search' section with a 'Select Query' dropdown menu set to 'CO - Permits in Review'. To the right of the dropdown is a 'Search By Query' button. Below the search section, there are 'Load' and 'Clear' buttons. The 'Total Payment Amount' is displayed as '\$0.00'.



TIP: Alternatively, select **Search By Case Info** to search by certain case information, such as the case template or a project associated to a case, and click **Search** to open the results.

5. In the results, select the check box for one or more cases to pay the total amount of fees and deposits. You can also click the down arrow to expand each case and select individual fees or deposits. The **Total Payment Amount**, in the upper-

right corner, updates as fees and deposits are selected.

6. Click **Make Payment** in the upper-right corner.

The screenshot shows the 'Payment Manager' interface with the 'Fees Results' and 'Deposits Results' sections. The 'Fees Results' section has a table with columns: Case Number, Business Case, Case Name, Case Status, and Total Amount Due. It lists two cases: 'R0P18-002' (Residential - Electric) and 'WSP18-004' (Utility Permit - New Residential Service). The 'Deposits Results' section also has a table with the same columns, listing two cases: 'WSP18-004' and 'APP20200301-70'. The 'Total Payment Amount' is updated to '\$210.00'.

7. In the **Make Payment** panel, select a payment method from the **Tender Type** drop-down list.
8. Enter any reference numbers or comments as needed.
9. Select the **Payer Info** drop-down list to add contact information for the payer.
10. Click **Make Payment**.

The screenshot shows the 'Make Payment' panel. It has a 'Tender Type' dropdown menu set to 'PAYPAL PayPal'. There is a 'Payment Amount' field with the value '210'. Below this, there are fields for 'Reference' (0 / 40) and 'Comments' (0 / 2000). At the bottom, there is a 'Payer Info' section with a 'Make Payment' button and a 'Close' button.

The **Fees**, **Deposit**, and **Payment** panels on each of the selected cases are updated to reflect the payment(s) made.