Payment Status Management

Documentation · https://viaspaces.com/Documentation/payment_status_management/

Track what's been paid, without touching the document's own workflow.

Payment Status answers the "has this been paid?" question separately from a document's normal workflow status — so a document can sit in Completed while you still track it toward Paid.

Where it lives

Every document has a Post-Processing panel, opened from its row on the Dashboard, with three tabs: Validity, Payments, and Accounting. This page covers Payments.

Recording a Payment

1. Open the document's Post-Processing panel from its Dashboard row.
2. Select the **Payments** tab.
3. Click **Add Payment** to record an amount against the document.
4. Select a **Status**.
5. Add Comments or Document Tags if you need to.
6. Click **Save**.

Status	Meaning
N/A	Payment status isn't tracked for this document.

Status	Meaning
Unpaid	Nothing has been paid yet.
Partially paid	Some, but not all, of the value has been paid.
Paid	The full value has been paid.

Payment Status on the Dashboard

Switch the Dashboard to its **Post-processing** view to add a Payment Status column alongside your document list, plus widgets that summarize your documents as Paid, Unpaid, and Partially Paid, with links to Billing & Invoicing and the Report center.