

Apply a Credit

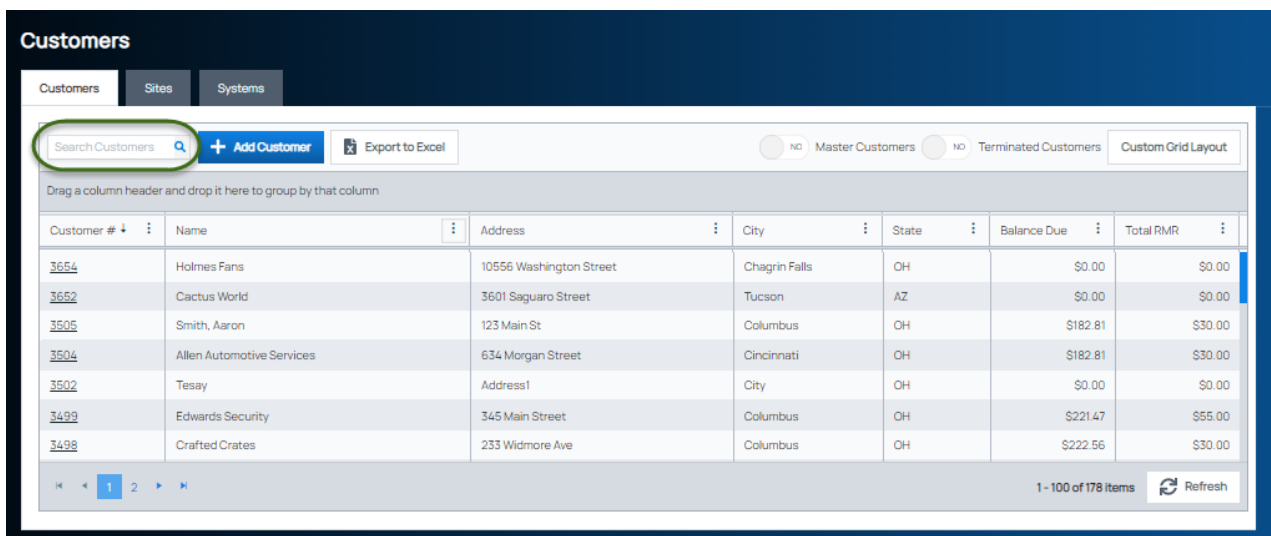
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If a credit was created for a customer, and there were no open invoices to apply the credit at the time of creation, you can manually apply credits to customer invoices when a new invoice is saved.

To apply a credit, you must first open the customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



The screenshot shows the 'Customers' list interface. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Customers' with a magnifying glass icon, a blue '+ Add Customer' button, and an 'Export to Excel' button. To the right of the search bar are two radio buttons for 'Master Customers' and 'Terminated Customers', both set to 'NO', and a 'Custom Grid Layout' button. Below this is a grey bar with the text 'Drag a column header and drop it here to group by that column'. The main area is a table with columns: Customer #, Name, Address, City, State, Balance Due, and Total RMR. The table contains several rows of customer data. At the bottom, there is a pagination bar showing '1 - 100 of 178 items' and a 'Refresh' button.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

The Customer record opens. Click on the Credits tab. A list of all credits for the customer will be shown in the grid area. For the credit you want to apply, click the Apply button on the credit in the grid.

Emily Wood
Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Total Balance Due Total RMR
\$0.00 **\$0.00**

Customer Aging

Address 45722 Chandler
Plymouth, MI 48170
Phone (734) 258-4646
Cell (734) 258-3311
Email emilylwood@gmail.com

Salesperson Dan Brown
Last Statement
Default Term
Delivery Method Print
Delivery RMR Inv YES

Comments

Invoices 0 Credits 0 Sites/Systems 1/0 RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 0 Documents Archive Custom Fields eForms Emails

+ Add Credit NO Show all credits

Credit #	Credit Date	PO Number	Total Amount	Credit Available	Reason	Apply
21465	Mar 25, 2022		(\$50.00)	(\$50.00)	Referral	<input checked="" type="checkbox"/>

1 - 1 of 1 items Refresh

The Apply Credit page opens. If there are invoices with a balance greater than zero, they are listed in the grid.

In the Apply column, type in the amount of the credit you want to apply to the invoice. You can apply the credit to multiple invoices as long as you do not exceed the amount of the credit.

When finished, click the Apply Credits button at the upper right of the page.

Apply Credit 14315 Cancel Apply Credits

Emily Wood

PO Number
Credit Date Mar 25, 2022
Contact
Credit Reason Referral

Sales Tax MI - 6.0000%
Salesperson Kathy Ackerman
Credit Method Print

Apply By Invoice
0 invoices selected

Credit Amount **\$50.00** 0% 50% 100% Remaining Credit **\$0.00**

Invoice #	Invoice Date	Due Date	Total Amount	Amount Due	Apply	Apply Amount
21463	Mar 25, 2022	Mar 25, 2022	\$250.00	\$225.00	<input checked="" type="checkbox"/>	\$50.00
21464	Mar 25, 2022	Mar 25, 2022	\$318.00	\$318.00	<input type="checkbox"/>	\$0.00

1 - 2 of 2 items

