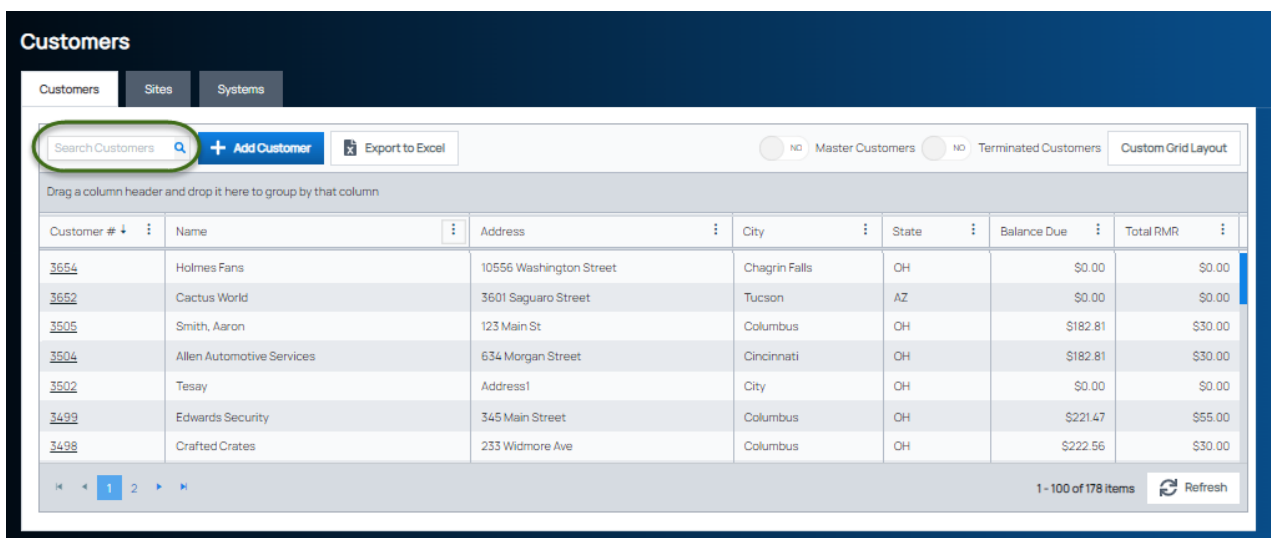# Unapply a Credit

If a credit was applied to the incorrect invoice, you can unapply the credit application. Do this from the Credit record or from the Invoice to which the credit was applied. Both methods are covered in this section.

Unapply a Credit from the Credit Record

To unapply a credit application, first access 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 Customer record opens. Click on the Credits tab, and then click on the toggle switch to Show All Credits. A list of all credits for the customer is shown in the grid area. In the Credit # column, click on the hyperlink of the credit you want to unapply.

The Credit record opens. Click on the Applications tab. All invoices to which the credit was applied are listed in the grid. Locate the invoice you want to reverse the credit application, and then click on the Unapply Credit button.

The credit is removed from the invoice and available to apply to a different invoice.
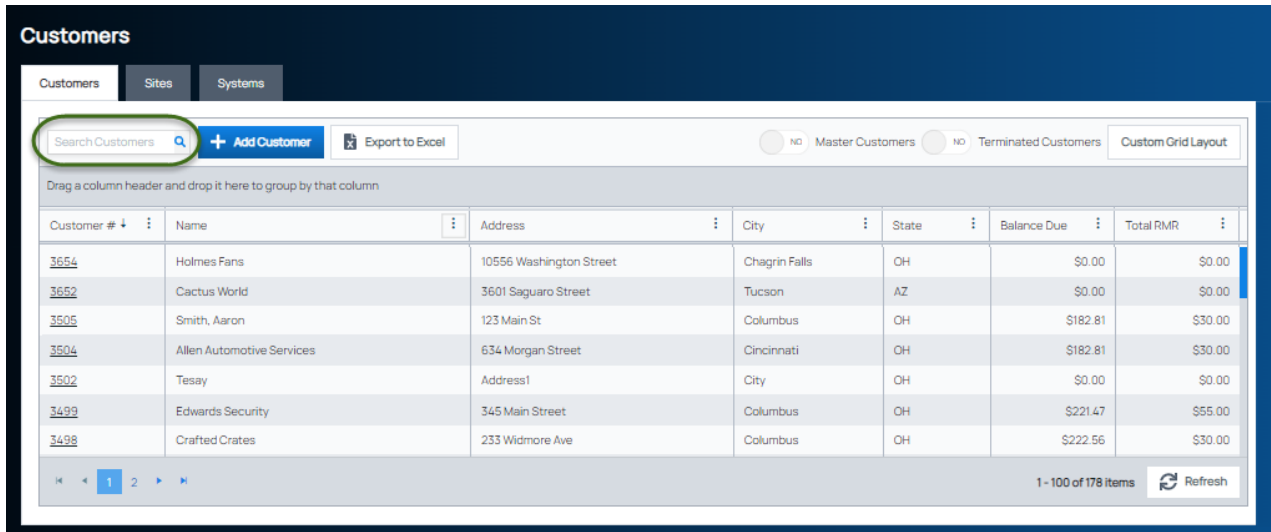

# Unapply a Credit from the Invoice Record

To unapply a credit application, first access 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 Customer record opens. Click the Invoices tab, and then click the toggle switch to Show All Invoices. A list of all invoices for the customer is shown in the grid area. In the Invoice # column, click on the hyperlink of the invoice where the credit was applied.
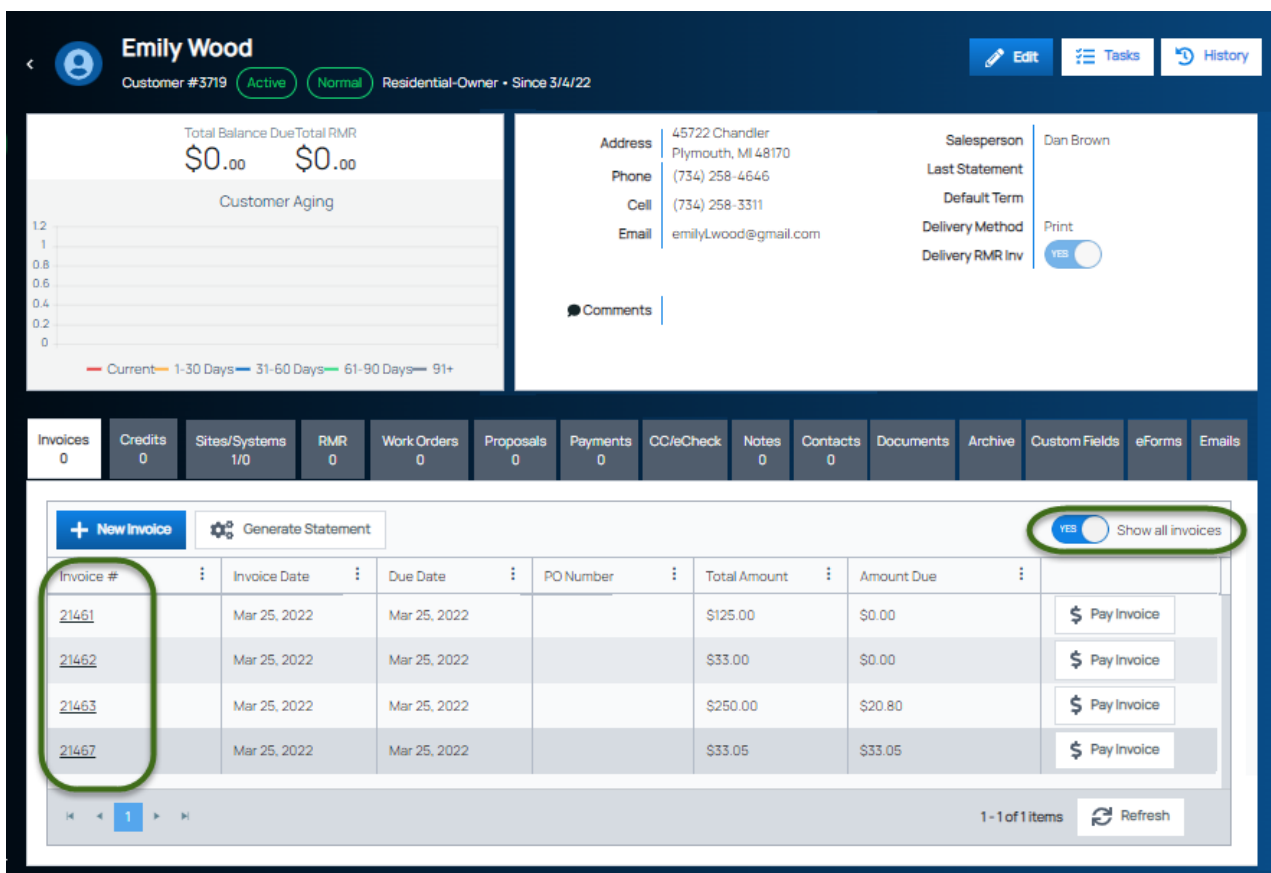
The Invoice opens. Click the Credits tab. All credits applied to the invoice are listed in the grid area. Locate the desired credit and then click the Unapply Credit button.

The credit is removed from the invoice and available to apply to a different invoice.