

Unapply a Credit

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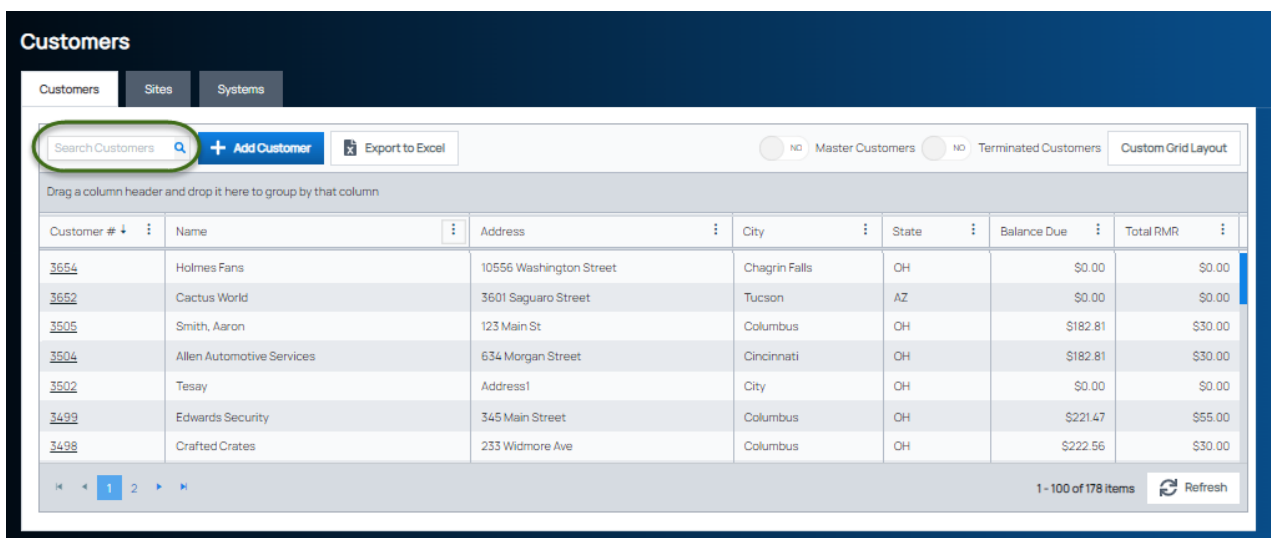
If a credit was applied to the incorrect invoice, you can unapply the credit application. Do this from the Credit record or from the Invoice to which the credit was applied. Both methods are covered in this section.

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 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 toggle switches for 'Master Customers' and 'Terminated Customers', both currently turned off, and a 'Custom Grid Layout' button. Below the search bar is a grid of customer records. The grid has columns for 'Customer #', 'Name', 'Address', 'City', 'State', 'Balance Due', and 'Total RMR'. The first row is highlighted in blue. At the bottom of the grid, there is a pagination bar showing '1' of 2 pages 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, 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.

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 YES Show all credits

Credit #	Credit Date	PO Number	Total Amount	Credit Available	Reason	
21466	Mar 25, 2022		(\$63.60)	(\$63.60)	Goodwill	<input checked="" type="checkbox"/> Apply
21465	Mar 25, 2022		(\$50.00)	\$0.00	Referral	
21450	Mar 22, 2022		(\$47.70)	(\$47.70)	Service-Issues	<input checked="" type="checkbox"/> Apply
21449	Mar 22, 2022		(\$25.00)	\$0.00	Referral	

1 - 1 of 1 items Refresh

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.

Credit 21449 Deliver Tasks History More...

Emily Wood #3719-01 Emily Wood - 45722 Chandler

Credit Amount **\$25.00** Credit Remaining **\$0.00**
1 Application = \$25.00

Category 100 G&A Salesperson Kathy Ackerman
PO Number - Delivery Method Print
Credit Date March 22, 2022 Originally Delivered -
Contact -
Credit Reason Referral
Sales Tax MI - 6.0000%

Items 1 **Applications 1** Tax Emails General Ledger

Applied Date	Amount Applied	Invoice	
Mar 25, 2022, 12:00:00 AM	\$25.00	21463	<input checked="" type="checkbox"/> Unapply Credit

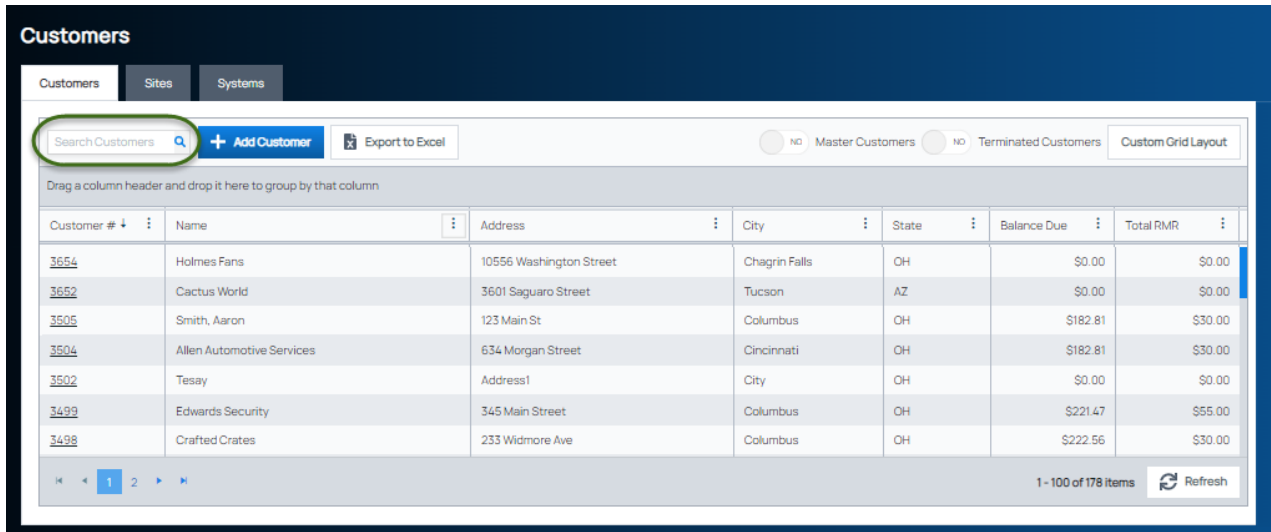
1 - 1 of 1 items Refresh

Unapply a Credit from the Invoice Record

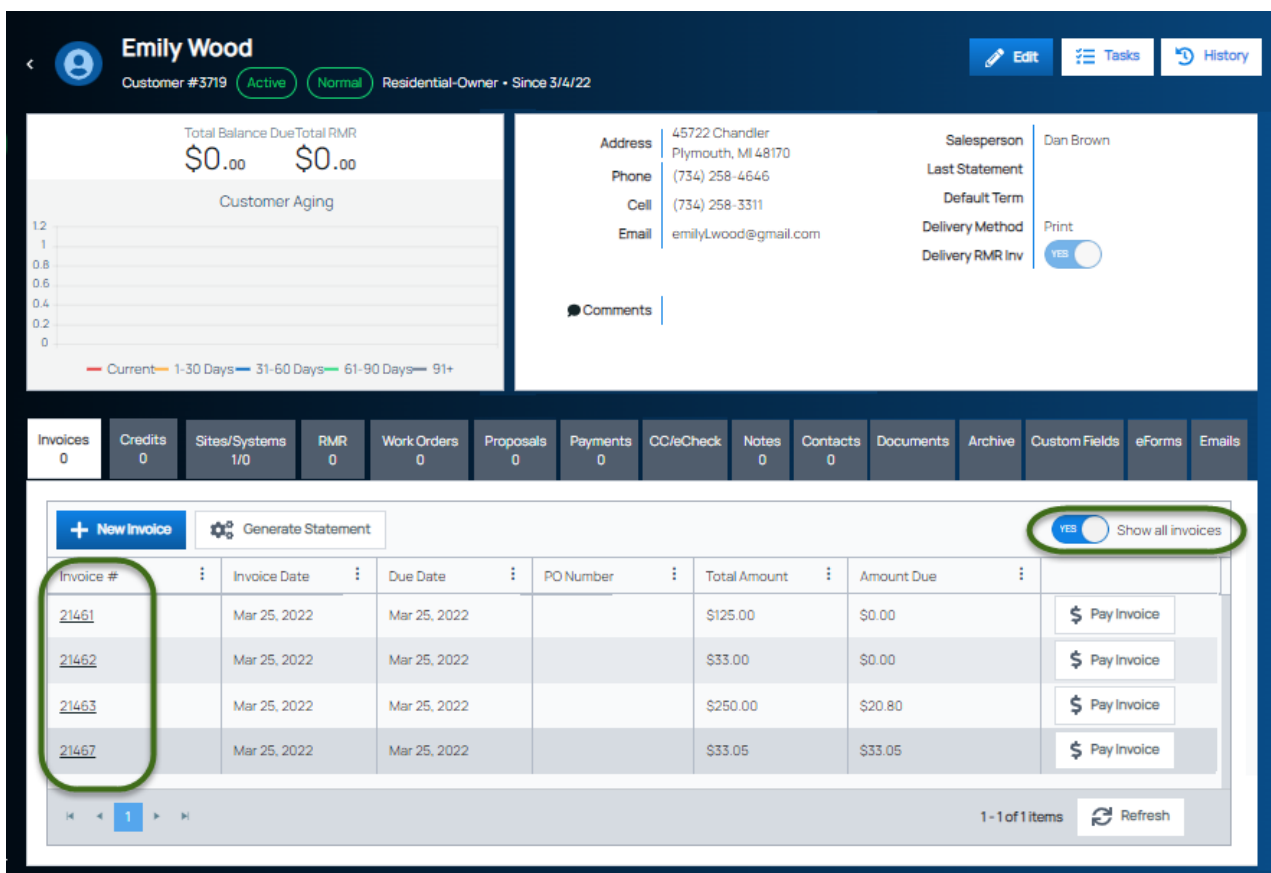
To unapply a credit application, first access the customer record.

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.

Manual Invoice 21463

Emily Wood #3719-01 Emily Wood - 45722 Chandler

Invoice Amount: **\$250.00**
Balance Due: **\$20.80**
1 Payment = \$154.20
4 Credits = \$75.00
1 day past due

Category: - Sales Tax: MI - 6.0000%
PO Number: - Term: Due on Receipt
Work Order: - Salesperson: Kathy Ackerman
Invoice Date: March 25, 2022 Delivery Method: Print
Due Date: March 25, 2022 Originally Delivered: -
Contact: - Sales Package: None

Items 1 | Parts 0 | Memo | Payments 1 | **Credits** | Tax | Emails | General Ledger | Part Ledger

Export to Excel

Applied Date	Amount Applied	Credit
Mar 26, 2022, 9:17:45 AM	\$25.00	21449

Unapply Credit

1 - 4 of 4 items Refresh