

# Credits Tab

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The Credits tab displays all credits with a balance available to apply to invoices.

## Show All Credits

Clicking on the toggle button labeled "Show All Credits", will display all credits with a zero and non-zero balance.

## Add Credit Button

Clicking on the Add Credit button will open the Credit form to create a manual credit for items and/or parts.

## Apply Button

Clicking the Apply Button will display a list of open invoices to which the credit may be applied.

## Credit Hyperlink

In the Credit # column, clicking on the hyperlink of a Credit will open the credit for viewing. Users with permissions are able to make changes to the credit and re-save, only if credit has not been partially applied to invoices.

The screenshot displays a customer profile for Emily Wood. At the top, the user's name and profile picture are shown. Below this, the customer's name, ID (#3719), status (Active, Normal), and account type (Residential-Owner) are listed. A navigation bar includes buttons for Edit, Tasks, and History. The main content area is divided into two sections: a financial summary and a customer information section. The financial summary shows a Total Balance Due of \$822.71 and a Total RMR of \$120.00. Below this is a Customer Aging bar chart with categories: Current, 1-30 Days, 31-60 Days, 61-90 Days, and 91+. The customer information section includes contact details (Address, Phone, Cell, Email) and account settings (Salesperson, Last Statement, Default Term, Delivery Method, Delivery RMR Inv). A Comments section is also present. At the bottom, a navigation menu shows various tabs: Invoices (7), Credits (2), Sites/Systems (2/3), RMR (5), Work Orders (2), Proposals (0), Payments (8), CC/Check, Notes (0), Contacts (2), Documents, Archive, Custom Fields, eForms, and Emails. The Credits tab is selected, showing a table with columns for Credit #, Credit Date, PO Number, Total Amount, Credit Available, and Reason. Two credits are listed: 21466 (Mar 25, 2022, \$63.60, Goodwill) and 21450 (Mar 22, 2022, \$47.70, Service-Issues). Each credit has an Apply button. A toggle for 'Show all credits' is set to 'NO'. The bottom of the table shows pagination (1 of 2 items) and a Refresh button.

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