

Applying a Customer Credit from the Orders Module Payment Dialog

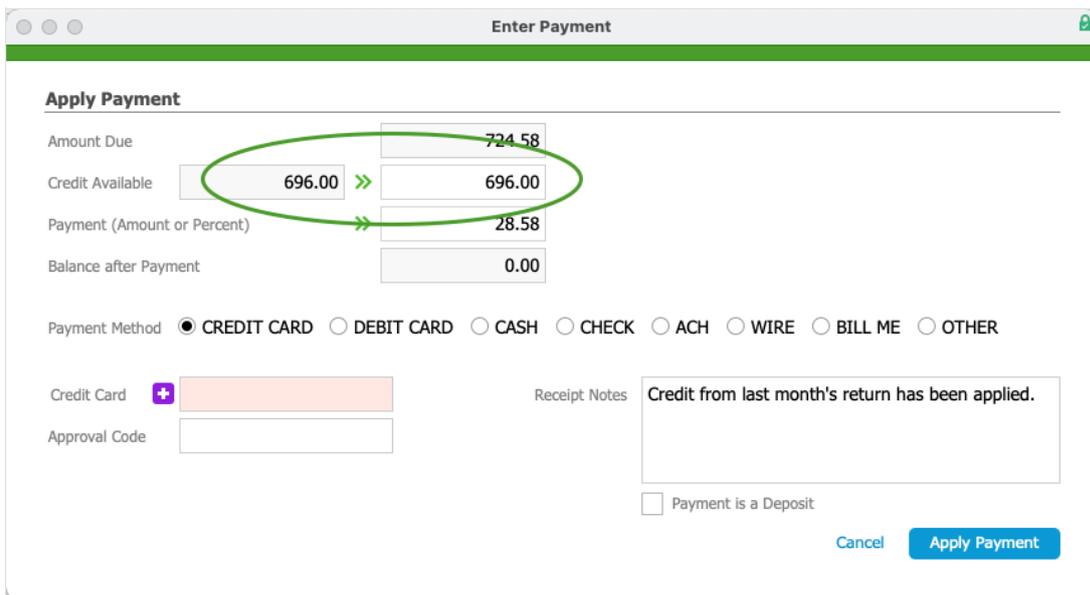
Last Modified on 10/12/2021 3:49 pm EDT

This guide explains how to apply a customer's existing credit to a new order. It is intended for general users.

When a customer account is carrying a credit (e.g. from a product return), it is displayed on the Order module in the A/R Balance field as a negative value. The customer may request that amount be applied to another open order:

1. Navigate from **Main Menu > Accounts Receivable (or Order Management) > Orders.**
2. Locate the order you want to apply the credit to.
3. On the Sales Order tab, next to the Payment Due field, click the **Plus (+)** icon.

The Enter Payment screen includes the Credit Available field, showing the amount of credit the customer has.



4. Click the **Apply (>>)** icon or type in the desired amount. aACE automatically calculates the remaining balance.
5. If needed, update the **Payment** field to reflect additional payment the customer is making.
6. Enter a comment in the **Receipt Notes** field to keep a record of how the payment was made.
7. Click **Apply Payment**.

