Applying a Customer Credit from the Orders Module Payment Dialog

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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.
- 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.

			Enter Payment	
Apply Payme	ent			
Amount Due			724 58	
Credit Available		696.00 >>	696.00	
Payment (Amou	nt or Percent)		28.58	
Balance after Payment			0.00	
Payment Method	CREDIT CA	ARD O DEBIT CA	IRD CASH CHECK ACH WIRE BILL ME C	THER
Credit Card	•		Receipt Notes Credit from last month's return has been	en applied.
Approval Code				
Approval Code				
Approval Code			Payment is a Deposit	

4. Click the Apply (\gg) 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.

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