Apply Open Credits

Overview

Open credits are available funds that have not been designated toward charges. They will automatically pay off a charge as the charge is posted if the open credit amount is equal to or greater than the charge. If there are not enough open credits to cover the entire charge, but you want to apply what money you have to a charge you can do it through Member Receipt.

1. Go to <<AR, Member Receipt>>

2. Select the [Member]

3. Blank out the [Payment] field by doing a <Shift><Backspace>

4. Press the <Tab> key or click into the Memo field

5. The amount of the open credit will appear on the Charge line item in the [Apply to

1. Charge] field

6. Review the entries for accuracy

7. Click <New> or <Post>

8. A message will display alerting you to the amount being used from open credits. Click <OK>.