

# Credits

Last Modified on 11/07/2016 2:24 pm EST

## Show All Credits

To see all credits including those that have already been applied, check the "Show All Credits" box on the right side of the page.

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
24	3	7	19	24	4	110	88	6	7	5	0

<b>Credits</b>							<a href="#">+ New Credit</a>
							<input type="checkbox"/> Show All Credits
Credit #	Credit Date	PO #	Total Amount	Credit Available	Reason	Action	
10964	06/01/2016		\$701.39	\$701.39		<a href="#">Apply</a>	

## Adding and Applying a New Credit

### 1. New Credit

Click "New Credit" in the right side of the page.

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
24	3	7	19	24	4	110	88	6	7	5	0

<b>Credits</b>							<a href="#">+ New Credit</a>
							<input type="checkbox"/> Show All Credits
Credit #	Credit Date	PO #	Total Amount	Credit Available	Reason	Action	
10964	06/01/2016		\$701.39	\$701.39		<a href="#">Apply</a>	

### 2. Complete Fields

Complete the fields for this credit. Some of these fields will be pre-populated.

#### New Credit: Matt Grossman - 1028

[Customer](#) [Save and Deliver](#) [Save](#)

Credit Number:	<input type="text" value="10992"/>
PO Number:	<input type="text"/>
Credit Date:	<input type="text" value="6/29/2016"/>
Contact:	<input type="text"/>
Credit Reason:	<input type="text" value="Please Select."/>

Customer Site:	<input type="text" value="Please Select."/>
Sales Tax:	<input type="text" value="Please Select."/>
Salesperson:	<input type="text" value="Brad Solomon"/>
Delivery Method:	<input type="text" value="Print"/>

Credit Number

**AlarmBiller will automatically generate a unique number in increments of one.**

PO Number

Enter the purchase order number here if applicable.

Credit Date

Enter the date that will be listed on the credit.

Credit Reason

Select credit reason from the dropdown box [\(hyperlink?\)](#).

Customer Site

Select the site you would like to link this credit to.

Sales Tax

Select tax for this invoice. This will adjust automatically when you choose the customer site but you can override this by selecting a different value from the dropdown box.

Salesperson

Select the customer's salesperson from the dropdown box [\(hyperlink\)](#).

Delivery Method

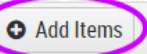
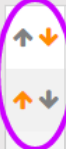






This field defaults to the delivery method selected in the customer manager page but can be overridden using the dropdown box.

### 3. Credit Items/Parts

To add items/parts to credit, click on the respective tabs and complete the following steps. The same steps apply for parts and items.

Items Total	Parts Total	Tax Total	Credit Total
\$35.00	\$54.95	\$4.50	\$94.45

Credit Items	Credit Parts	Memo						
<input type="checkbox"/> Tax Exempt								
<div style="display: flex; justify-content: space-between;"> <span><b>a.</b> </span> <span>Search By Site <input type="text"/></span> </div>								
Sort	Item Code	Item Description	Qty	Rate	Tax?	Sales Tax	Amount	
<b>Site: Peter Shore - 6116 Benhurst Road, OH</b>								
<b>b.</b> 	trip fee	trip fee	1	\$25.00	Y	MD	\$25.00	  <b>c.</b> 
	Recurring	Recurring Credit	1	\$10.00	Y	MD	\$10.00	  
								1 - 2 of 2 items

#### a. Add Items

Click "Add Items". An "Add Credits" page will appear. Check the boxes on the left side of the items you would like to credit. If you would like to create a new item, select "Create Item" in the upper right corner, complete the fields in the "New Item" page that appears [\(hyperlinks to new items/parts fields\)](#), and press save in the bottom right corner. When you are done adding items, click "Add Items" in the bottom right corner.

#### b. Sort

To sort the order you would like items to appear on the credit, use the arrows to the left of the item you would like to move.

#### c. Assign to Site

Items will automatically be assigned to the site you designated in the "Customer Site" field in step 2. To assign an item to a different site, select the linking icon to the right of the item you are re-assigning, select the site from the dropdown box, and press "Assign" in the bottom right corner.

## 4. Memo

If you would like to add a memo to this credit, click the memo tab and input your message. This memo WILL appear on the credit.

Credit Items	Credit Parts	<b>Memo</b>
<b>Memo:</b> <input type="text"/>		

## 5. Save and Deliver

Click "Save and Deliver" in the upper right corner of the page to deliver the credit now. The credit will be delivered by the method selected in the "Delivery Method" field.

**New Credit: Matt Grossman - 1028**

Customer **Save and Deliver** Save

<b>Credit Number:</b> 10992	<b>Customer Site:</b> Please Select: ▼
<b>PO Number:</b> <input type="text"/>	<b>Sales Tax:</b> Please Select: ▼

\*Note: If the delivery method is set to "Print" the credit will not automatically download a pdf at this time. You can print the credit through the Credit Details Page (see Print/Deliver in the Credit Details Page Section Below).

## 6. Save

If you select "Save", the credit will be saved but not delivered.

**New Credit: Matt Grossman - 1028**

Customer **Save and Deliver** **Save**

<b>Credit Number:</b> 10992	<b>Customer Site:</b> Please Select: ▼
<b>PO Number:</b> <input type="text"/>	<b>Sales Tax:</b> Please Select: ▼

After completing step 5. or 6. the "Apply Credit Page" will appear showing all the customer's open invoices.

## Apply Credit: Matt Grossman - 1028

[Customer](#) [Cancel](#) [Apply](#)

**Credit Number:** 10857  
**PO Number:**  
**Credit Date:** 02/25/2016  
**Contact:**  
**Credit Reason:** Unknown

**Customer Site:** Matt Grossman  
**Sales Tax:** None  
**Salesperson:** Brad Solomon  
**Credit Method:** Email

8.

Credit Total		Applied Total		Credit Remaining	
\$50.00		\$50.00		\$0.00	

Apply Credit	Invoice #	Invoice Date	Due Date	Total Amount	Amount Due	Apply Amount
No	10748	10/18/2015	11/17/2015	\$14,727.45	\$11,559.17	\$0.00
Yes	10756	11/01/2015	12/01/2015	\$589.69	\$124.69	\$25.00
Yes	10757	11/01/2015	12/01/2015	\$555.00	\$355.00	\$25.00
No	10780	11/15/2015	12/15/2015	\$366.20	\$66.20	\$0.00

## 7. Apply Amount

Apply the credit by entering the amount in the blue box to the right of the invoice you wish to apply it to. You can also apply the credit to multiple invoices by entering values to multiple invoices that add to the credit's amount.

## 8. Apply

Click "Apply" to apply the credit.

## Applying an Existing Credit

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
21	4	7	20	18	5	109	86	6	8	5	0

Credits							<a href="#">New Credit</a>
							<input type="checkbox"/> Show All Credits
Credit #	Credit Date	PO #	Total Amount	Credit Available	Reason	Action	
<a href="#">10857</a>	02/25/2016		\$50.00	\$50.00	Unknown	<a href="#">Apply</a>	

To apply an existing credit from the Customer Manager Page, click "Apply" to the right of the credit you wish to apply on the customer manager page. Then follow steps 7-8 of "Adding and Applying a New Credit".

## Credit Details Page

From the Customer Manager Page, click the blue "Credit #" hyperlink to the left of the credit to view the Credit Details Page.

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
24	4	7	19	24	4	110	88	6	7	5	0

Credit #	Credit Date	PO #	Total Amount	Credit Available	Reason	Action
10993	06/29/2016		\$55.00	\$55.00		Apply

A dashboard of information about the credit will appear

**Credit: Matt Grossman - 1028**

Customer Site: #1 Matt Grossman - 11 Eastway  
 Sales Tax: None  
 Salesperson: Brad Solomon  
 Delivery Method: Print

Items Total	Parts Total	Tax Total	Credit Total	Credit Used	Credit Available
\$55.00	\$0.00	\$0.00	\$55.00	(\$0.00)	\$55.00

Credit Items	Credit Parts	Memo	Credit Applied Details	Sales Tax																					
<table border="1"> <thead> <tr> <th>Item Part Code</th> <th>Item Description</th> <th>Qty</th> <th>Rate</th> <th>Taxable</th> <th>Sales Tax Code</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td colspan="7">Site: Matt Grossman - 11 Eastway, GA</td> </tr> <tr> <td>asdff</td> <td>asf</td> <td>1</td> <td>(\$55.00)</td> <td>Yes</td> <td>None</td> <td>(\$55.00)</td> </tr> </tbody> </table>					Item Part Code	Item Description	Qty	Rate	Taxable	Sales Tax Code	Amount	Site: Matt Grossman - 11 Eastway, GA							asdff	asf	1	(\$55.00)	Yes	None	(\$55.00)
Item Part Code	Item Description	Qty	Rate	Taxable	Sales Tax Code	Amount																			
Site: Matt Grossman - 11 Eastway, GA																									
asdff	asf	1	(\$55.00)	Yes	None	(\$55.00)																			

## Edit

Click "Edit" in the upper right corner of the page to edit the credit. Change desired fields (hyperlink create a new manual invoice) and click save in the upper right corner to update.

**Credit: Matt Grossman - 1028**

Customer Site: #1 Matt Grossman - 11 Eastway  
 Sales Tax: None  
 Salesperson: Brad Solomon

## GL

Click "GL" To view the general ledger entry for this credit [??? hyperlink](#)

## Print/Deliver

to print or deliver the invoice, click the print/deliver icon in the upper right corner of the page:

**Credit: Matt Grossman - 1028**

Customer

GL

Apply

Edit

Delete

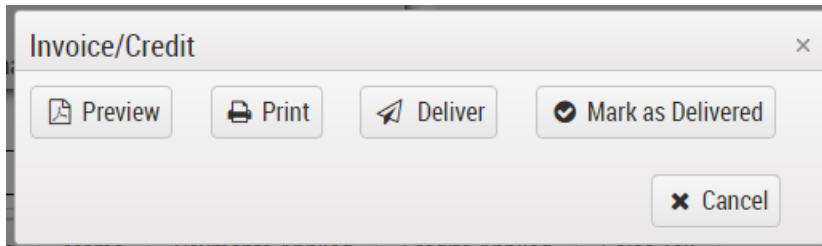
Print/Deliver

Credit Number: 10993  
PO Number:  
Credit Date: 06/29/2016

Customer Site: #1 Matt Grossman - 11 Eastway  
Sales Tax: None  
Salesperson: Brad Solomon

An Invoice/Credit Delivery Options Box will appear.

If the credit has not been delivered this box will appear:



### Preview

Click "Preview" to download a pdf of the credit to your documents. This will NOT mark the credit as delivered.

### Print

Click "Print" to download a pdf of the credit to your documents. This will mark the credit as delivered.

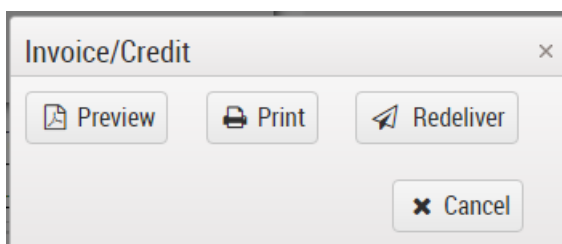
### Deliver

Click "Deliver" to deliver the credit Via Mail or Email. A box will appear where you can choose between the two delivery methods. [hyperlink to delivery methods](#)

### Mark as Delivered

Click "Mark as Delivered" to mark the credit as delivered. This will not deliver the credit.

If the credit has already been delivered this box will appear:



### Preview

Click "Preview" to download a pdf of the credit to your documents.

## Print

Click "Print" to download a pdf of the credit to your documents.

## Redeliver

Click "Redeliver" to redeliver the credit Via Mail or Email. A box will appear where you can choose between the two delivery methods.

## Apply

To apply this credit to an invoice, click "Apply" in the upper right corner of the page. Then follow steps 7-8 of "Adding and Applying a New Credit".

### Credit: Matt Grossman - 1028

[Customer](#)[GL](#)[Apply](#)[Edit](#)[Delete](#)[Print](#)

**Credit Number:** 10993

**PO Number:**

**Credit Date:** 06/29/2016

**Customer Site:** #1 Matt Grossman - 11 Eastway

**Sales Tax:** None

**Salesperson:** Brad Solomon