How to Apply a Portion of Unapplied Cash to an Invoice

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There are times customers will overpay on their account and will need to apply part of those overpayments to invoices. These steps will help in accomplishing this task.

Overview

Below example will show how to apply a portion of unapplied cash $1000 to an invoice that needs paid for $206.09.

Steps:

1. Open the customer account to apply the Unapplied Cash

2. Highlight the cash to be used – Right Click and Select Apply

3. The apply Customer Credit window will open showing the available open invoices. Fill in the Apply Date and Payment amount to be applied to the invoice – Click Save

4. In the customer's overview the Invoice is no longer showing as open, and the balance left from the Unapplied Cash is showing.