

Open Credits Overview

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Under the Open Credits area, all unapplied Cash, Advance Deposits and Credit Memos associated with the customer will be listed. When highlighting one of the open Credit Items in the Active Pane and right-clicking, there are different options available depending on the type of the unapplied item.

For unapplied Credit Memos and Advance Deposits, the right-click options are Apply and Refresh.

For unapplied Cash, the right-click options are Apply, Auto Apply, Refresh, and Transfer to Another Customer.

Follow the links below for more information on each right-click option.

- [Apply](#)
- [Auto Apply](#)
- [Refresh](#)
- [Transfer to Another Customer](#)

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