

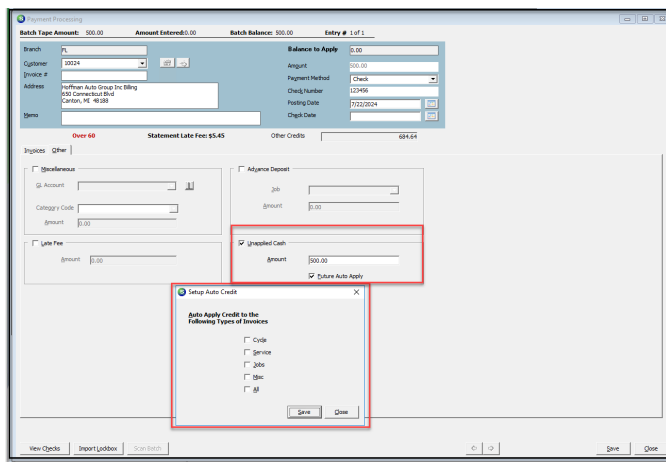
How To Set Up Auto Apply for Unapplied Cash

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There are two ways to set up Unapplied Cash to Auto Apply for specific Invoice Types.

Payment Processing

When entering a Payment in Payment Processing as Unapplied Cash you have the option to enter a portion or the full amount of the payment and select which Invoice Type(s) the Unapplied Cash will automatically be applied to when that invoice is created and saved.



Customer Account

If a Customer Account has Unapplied Cash on their Account, you can right click on that Item and select Auto-Apply.

Select the Other Tab and Unapplied Cash.

The Setup Auto Credit will open and if the Unapplied Cash was previously set up to be automatically applied to a specific Invoice Type, that box will be selected.

Credit #	Site Name	Credit Type	Date	Amount	Balance
Open Credits \$1,934.64					
393022	Testing Version 52	CREDIT			\$75.00
478505	Hoffman Auto Group-New	CREDIT			\$107.25
478833	Omnicare - 2	CREDIT			\$134.69
497279	Omnicare - 2	CREDIT			\$194.72
392150	Hoffman Auto Group	CREDIT			\$22.37
497233	Hoffman Auto Group-Sub2	CREDIT			\$27.39
	Hoffman Auto Group-New	CASH			\$500.00
478864	Hoffman Auto Group-Sub2	CREDIT			\$36.72
	Hoffman Auto Group-New	CASH	2/28/2024	\$750.00	\$750.00
497229	Hoffman Auto Group-Sub2	CREDIT	2/28/2024	\$1,551.62	\$86.50

Apply

Auto Apply

Transfer To Another Customer

Refresh

Setup Auto Credit

Auto Apply Unapplied Cash to the Following Types of Invoices

Cycle

Service

Jobs

Misc

All

If none of the boxes are selected, then you can mark which Invoice Type(s) you want the Unapplied Cash to be automatically applied to when that invoice is created and saved.