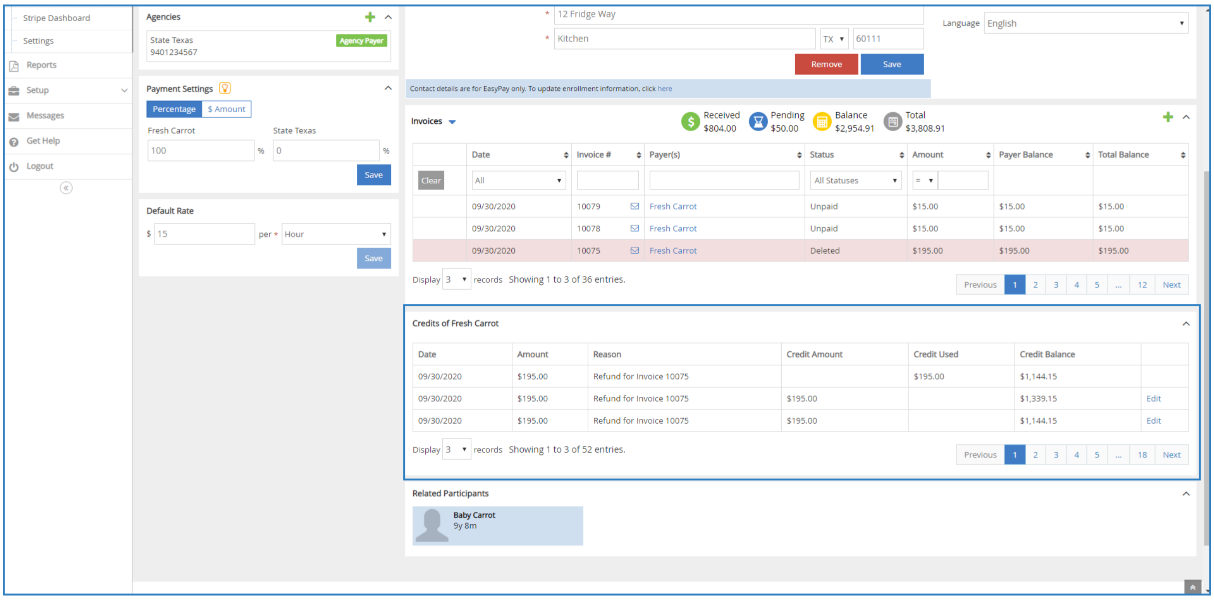
Manage Account Credits

Last Modified on 02/09/2023 9:45 am CST

When a contact or agency overpays an invoice, a credit is added to their account. You may also have issued a refund in the form of account credit. This page also lists any credits used towards invoice payments. You can view and manage these credits from the Participant Account Details page.

1. From the menu to the left, click **Accounting**.
2. Click **Accounts**. The Participant Account Details page opens and displays information for the last participant you viewed.
3. Click the drop-down menu at the top of the page and select the participant to update.
4. Select a contact from the **Contacts** section or an agency from the **Agencies** section.
5. Scroll to the **Credits Of** section (to the right). If this section does not display, click ⌄ to expand it.



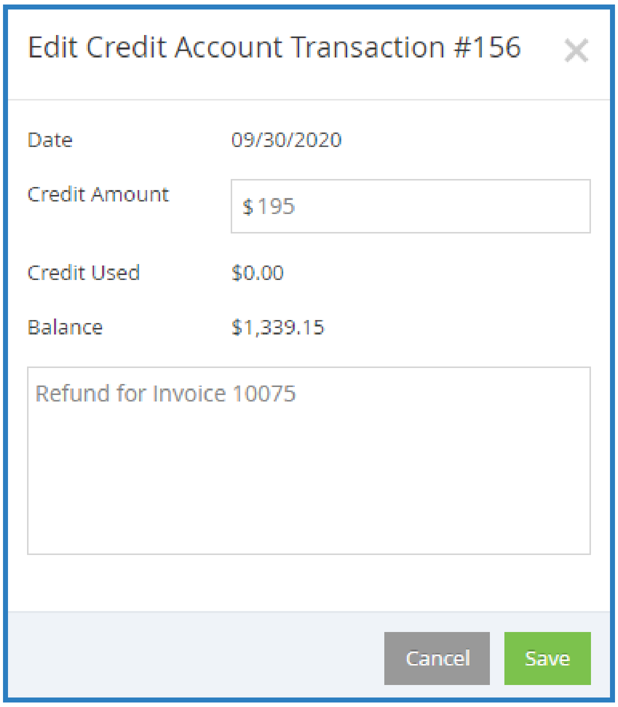
The following details for each credit displays:

- **Date:** This is the date the credit was issued or used.
- **Amount:** This is the total amount of the credit issued or used.
- **Reason:** This is the reason the credit was issued or used. For example, if the credit was issued for overpayment, this column would state Overpayment for Invoice #### (where #### is the affected invoice number). If it was used as a payment, this column would say Credit Used for Invoice #### (where #### is the affected invoice number).
- **Credit Amount:** This is the total credit amount issued. This column is blank for credits used as payment.
- **Credit Used:** This is the amount of account credit this contact/agency used to pay an invoice.
- **Balance:** This is the remaining credit balance for the contact/agency.

6. To update a credit:

> **Note:** You can only edit credit issued—not credit used.

   a. Click **Edit** on the credit row to change. The Edit Credit Account Transaction pop-up opens.



b. Click the **Credit Amount** box and enter a new amount.

c. Click the **Notes** box and enter additional notes, as needed.

d. When finished, click **Save**.