How To Manage Customer Accounts Receivable

When an invoice is created but no payment type is selected or the full amount owing is not paid, the amount owing will be added to the customer's account in the "Accounts Receivable" section. This is separate from Invoices and can be managed by going to the 'Customer/Patients' dropdown menu, then selecting either "Accounts Receivable" or "Accounts Receivable Transactions".

Accounts Receivable- This section is where you can view and manage all of your customers/patients and what they owe/account credit they have. You can also use the "$" icon to take a payment towards the customers owing balance.

Accounts Receivable Transactions- This section is to view and manage what actions occurred on a customer's account. For example, if a payment was made on the customer's account, this section will now show the payment information. This is also where payments/charges made by mistake can be ***DELETED*** . To remove a payment, click the garbage can icon. This will directly translate to the customer total in the (AR) section.

Giving a Credit To a Customer- Crediting a customer account, enables the customer to use the credit towards future product and service purchases. This is done by going to ***Accounts Receivable (AR).*** Click the '$' icon and input the amount you wish to give them as a ***NEGATIVE***, then select the appropriate payment option and click '**Make Payment'**. The customer will now have a negative balance (Credit) on their account.

Using a Credit Towards a Sale- You will see a credit balance in the sales register after you enter a customer's name. There will also be a new 'Account Credit' button beside the payment buttons - select the account credit button to apply all or part of the available credit to the sale. Then complete your invoice.

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