TO SET UP CREDIT ACCOUNTS:

Setting up Company Accounts

1. Go to Back Office / Customer / Company Accounts
2. select New
3. enter all company info (make sure you assign an account #)
4. exit, hit Refresh List, exit

Setting up Customer with Account

1. Go to Back Office / Customer / Customer List
2. Lookup customer by last name OR hit New
3. if new, enter all customer info
4. at bottom left, check the Allow Credit? Box
5. select a Credit Company Name using the drop down box
6. save, exit

Setting up Payment Method to allow Credit

1. Go to Back Office / General / Payment Method
2. scroll down through the list until you find open line
3. enter Credit Account in first box
4. enter Customer Account Credit in second box behind it
5. for Type: use drop down box to select Account
6. check the Amount Due Default box
7. make sure the Active box is checked
8. save, exit

Setting up Cash Receipt option – accepting payment

1. Go to Back Office / Inventory / Vendors
2. select New Vendor
3. enter name Account Pymts.
4. at bottom of screen, be sure to check 'Allow receiving of Non Sale Receipts from Vendor' and 'Allow Paidouts to Vendor'
5. close screen and Refresh list
6. save, exit

TO CHARGE AN ORDER TO CREDIT ACCOUNT:

1. go to the menu
2. hit Customer, find by name
3. enter order
4. when ready to Collect, select Credit Account for Payment Type
5. hit Tender (this will associate the customer with the account and automatically assign it to that accounts invoice)

TO VIEW ORDERS/CHARGES TO CREDIT ACCOUNT:

1. Go to Back Office / Customer / Company List
2. select company you would like to view (click on far right to select)
3. hit Detail
4. hit Company Credit List

This will pull up all the charges to this account. You can preview and/or print. The computer will ask you when printing if you would like to mark it as Invoiced.

TO ACCEPT ACCOUNT PAYMENT:

** to do this you must be setup on a cash drawer

1. Go to Cash / Cash Receipts
2. select vendor Account Pymt.
3. enter payment method, amount, and any notes
4. hit Tender to complete transaction
5. Go to Back Office / Customer / Company List
6. select company that made payment
7. hit Detail
8. hit Company Credit List
9. mark (check) any/all invoices Paid