Add Customer Credit

How to Add Customer Credit in Muhasib ERP

Overview

This guide will help you add an approved credit amount to a customer's account.

Muhasib increases available customer credit or reduces the customer balance according to settings.

Who can do this

You need access to Customer Credit plus customer/account access and any override approval.

Before you start

Confirm the business reason, amount, date, reference, accounting treatment, supporting evidence, and approver.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Sales & Customers → Customer Credit.

Add Customer Credit

Step 1: Start a new customer credit

Step 2: Select the customer and date

Step 3: Enter amount, reference, account/reason, and notes

Step 4: Attach or retain supporting evidence according to policy

Step 5: Review whether a return or receipt is the correct workflow instead

Step 6: Save once

Check your work

Compare and Confirm the credit document, customer ledger, available credit, and general-ledger impact.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not duplicate credit already produced by a return.
- Reverse through the approved correction workflow instead of entering an unexplained offset.

Related guides

- Apply Customer Credit to a Sale
- Return a Sale
- Correct or Reverse a Customer or Agent Transaction

What to do next

Apply Customer Credit to a Sale.

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