Apply Customer Credit to a Sale

How to Apply Customer Credit to a Sale in Muhasib ERP

Overview

This guide will help you apply an approved customer credit amount toward an allowed sale.

Muhasib reduces available customer credit and the sale due, and records customer/payment/GL allocations as set up.

Who can do this

You need access to POS Sale Add and needed customer-credit permissions.

Before you start

Select the exact customer and check credit source, available balance, expiry/restrictions, sale due, and authorization.

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

Where to find it

Open POS sale → Checkout → Apply Credit.

Apply Customer Credit to a Sale

Step 1: Confirm customer and sale total

Step 2: Open Apply Credit

Step 3: Review available credit records/balance

Step 4: Enter/select the approved amount, not exceeding eligible credit or due

Enter/select the approved amount, not exceeding allowed credit or due.

Step 5: Add another payment for any remainder

Step 6: Finalize once

Check your work

Compare and Confirm receipt, customer credit balance/history, Customer Ledger, payment allocations, and GL.

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

If something goes wrong

- Do not create new credit merely to complete checkout.
- Reverse through supported customer transaction management if allocation is wrong.

Related guides

- Add Customer Credit
- Configure Customer Credit and Loyalty
- Check Out a Sale with Multiple Payments

What to do next

> **Add Customer Credit**.

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