Pay or Refund a Customer

How to Pay or Refund a Customer in Muhasib ERP

Overview

This guide will help you record an authorized payment or refund made to a customer.

Muhasib records money paid and reduces customer credit or otherwise updates the customer balance.

Who can do this

You need access to Customer Pay/Refund plus payment-account and customer.

Before you start

Confirm customer credit availability, amount, payment method/account, date, reference, reason, and approval.

> 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 Pay/Refund.

Pay or Refund a Customer

Step 1: Start a new customer payout

Step 2: Select the customer and verify available credit/balance

Step 3: Enter date, amount, payment method, paying account, and reference

Step 4: Select related credit/return transactions when supported

Step 5: Review authorization and save once

Step 6: Issue the approved payment evidence

Check your work

Compare and Confirm the payout, customer ledger, source credit/return, cash/bank account, and payment evidence.

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

If something goes wrong

- Do not refund more than the approved available credit.
- Search for the reference before retrying.

Related guides

- Add Customer Credit
- Return a Sale
- Correct or Reverse a Customer or Agent Transaction

What to do next

Add Customer Credit.

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