

Customer Credits

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Credit Memos and Unapplied Payments

On the customer overview page, any outstanding credit memos or Unapplied payments will be shown for the customer. This is a view only option and cannot be acted upon in the portal. To use/apply an available credit to an invoice, you will need to do so directly in the accounting package and then run a sync to update the portal.

ID	TYPE	REMAINING CREDIT
QBINV123491	Memo	\$199.00

Security Permissions can restrict the viewing of credits on the customer portal side. This is done under the [Client Profiles](#) section "Can View Credits" option.

*Note: we won't display "overage" type payments.