Processing An Order Using An Account Balance

1. Log into **Sales**.

2. Click the **Maintenance** Icon. (Image 2)

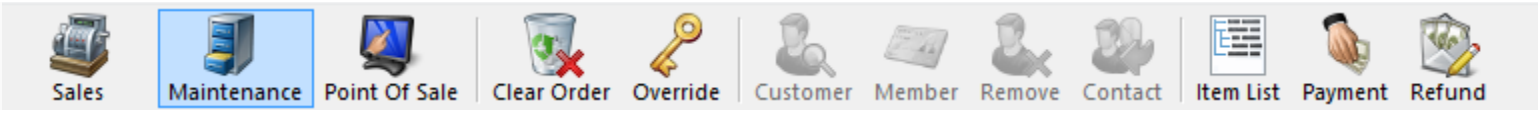


Image 2

3. Search for the customer by entering the **Order #** or the customer's **Last Name**. Then click the appropriate green check mark. Double click the correct order to bring up order contents on the **Item Summary** page. (Image 3)

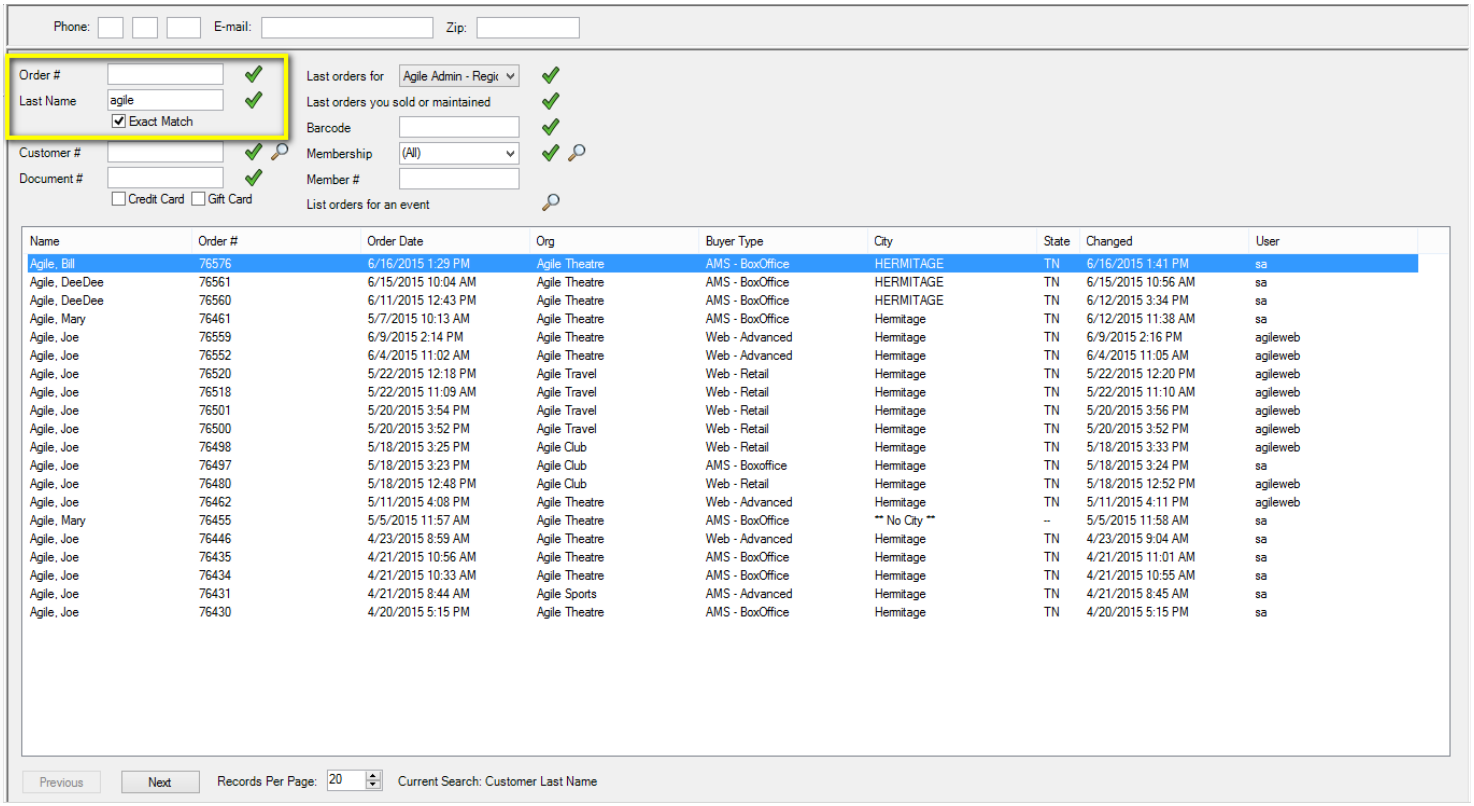


Image 3

4. Your order should have an **Account Balance** visible in the upper right-hand corner. (Image 4)

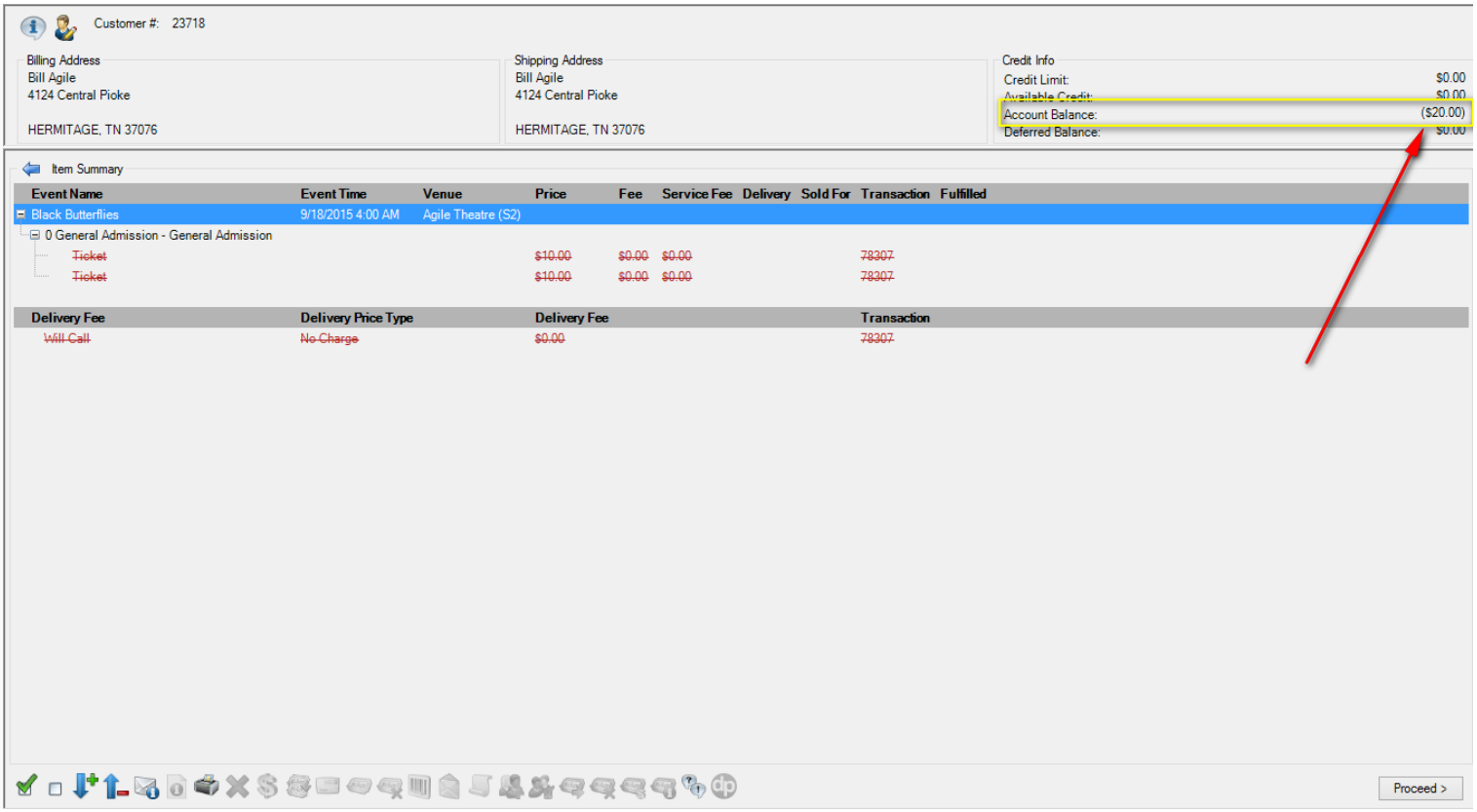
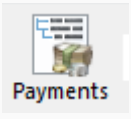


Image 4

5. Click on the **Payments** icon 

at the top of the page to verify the refund method. If it has been done through Account Balance, you will see the line item. (Image 5)

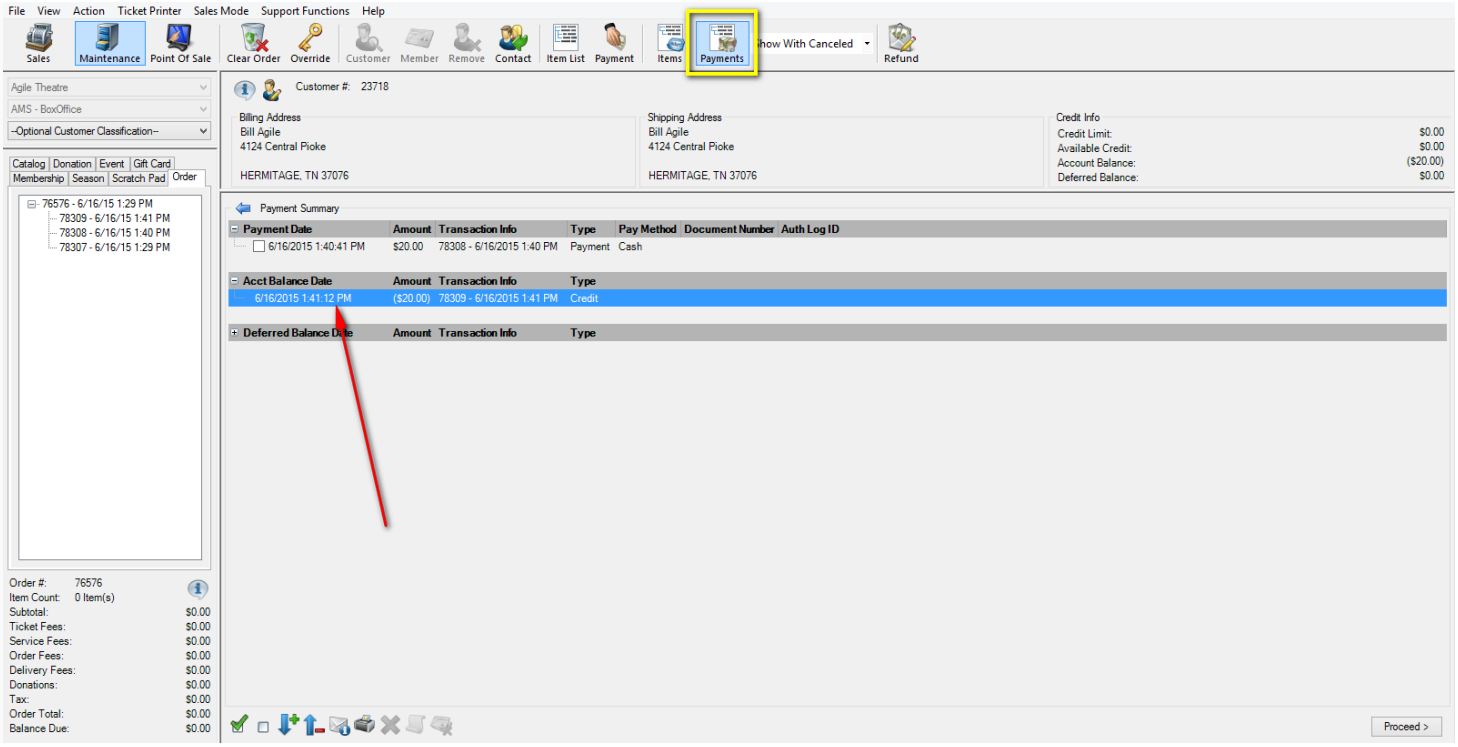


Image 5

6. Off to the side, select the **Event** tab and then the **Line Item** you wish to sell. (Image 6)

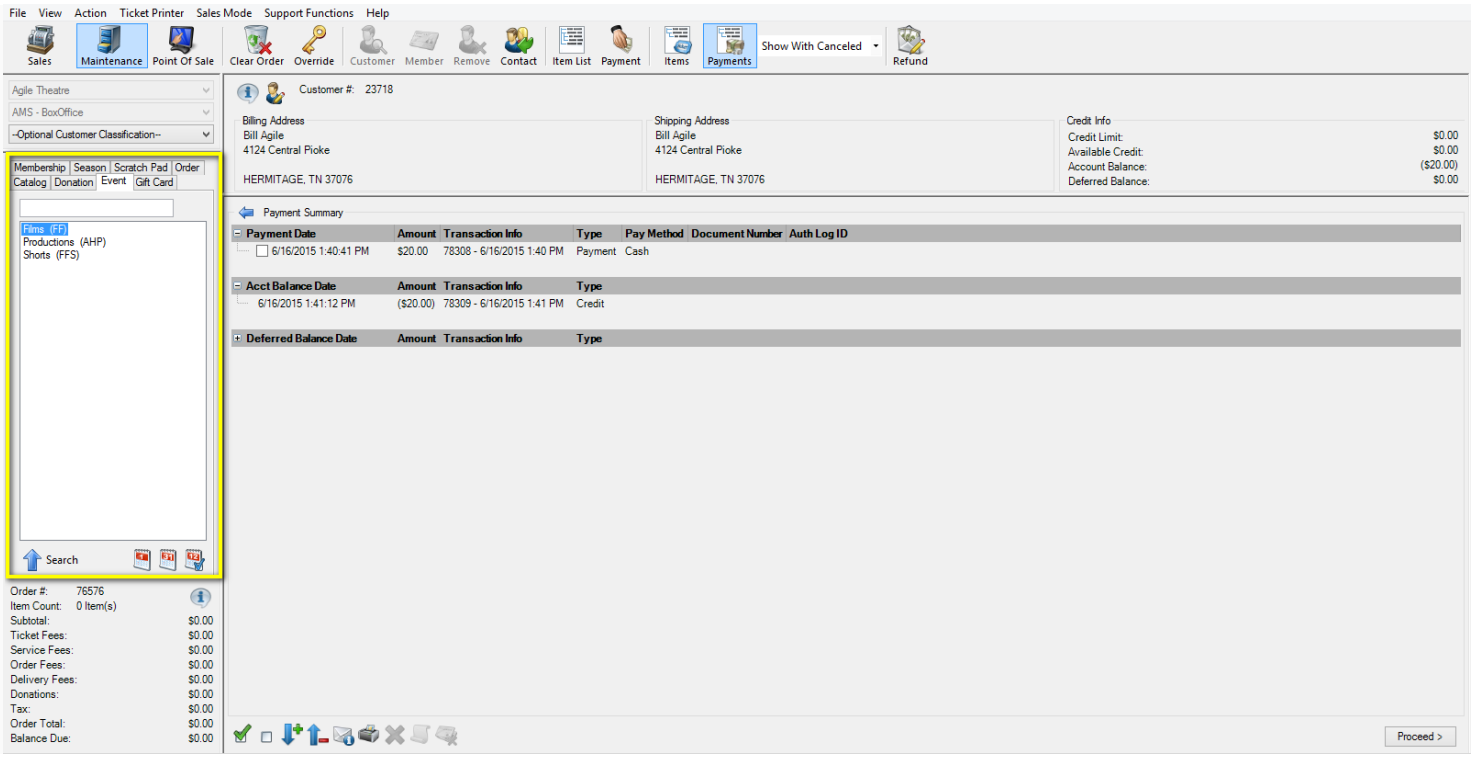


Image 6

7. Select the event or show from the list on the right. Add the quantity of tickets for your new event. Then click **Proceed**. (Image 7)

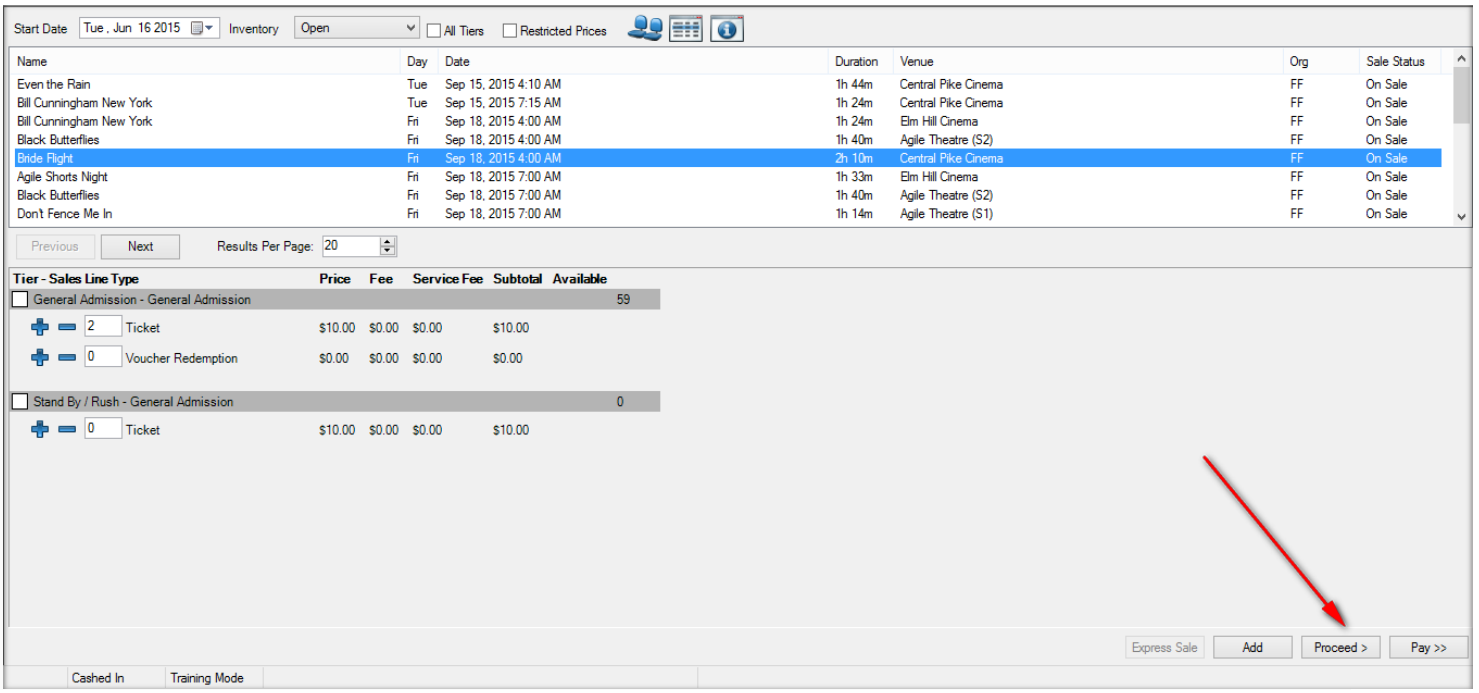


Image 7

8. You will then be brought back to the Line Item Summary, from there click Proceed. (Image 8)

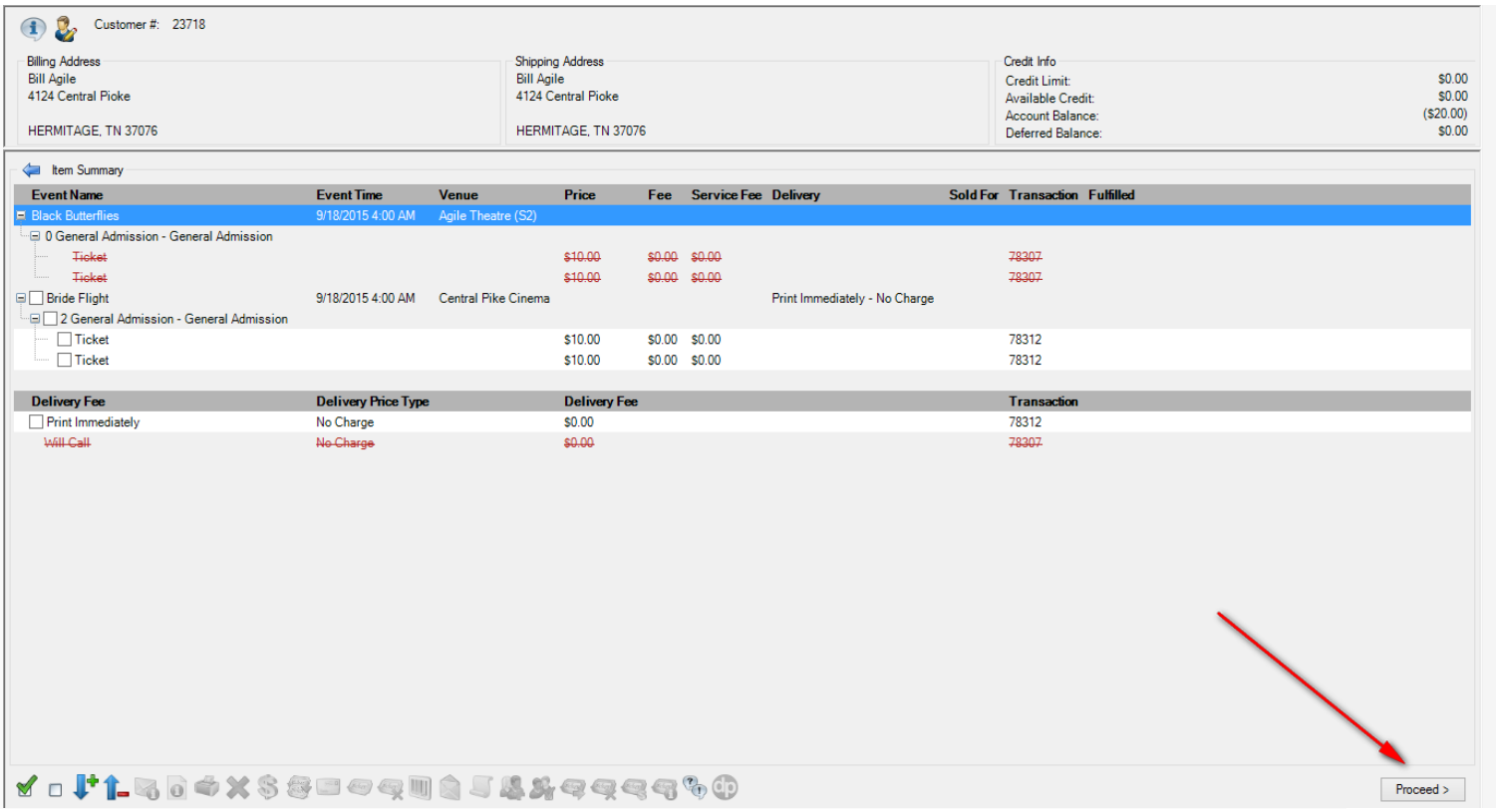


Image 8

9. On the Payment Information page under payment method select **Apply Account Balance up to** ...this will apply the Account balance to the new tickets. If the Account Balance only partially covers the full payment due, click Apply Payment. Then pay the remaining balance as normal. Click Finalize. (Image 9)

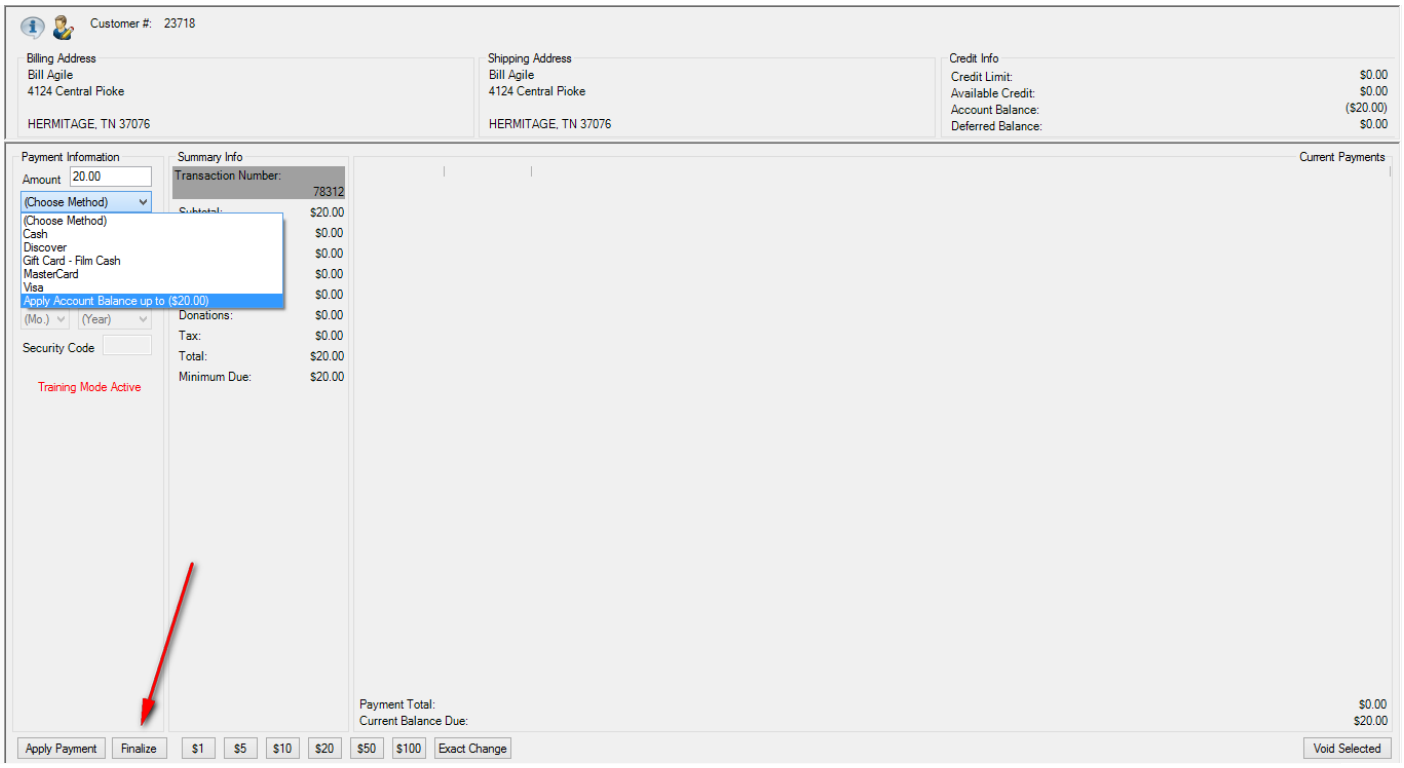

Customer #: 23718
Billing Address
Bill Agile
4124 Central Pioke
HERMITAGE, TN 37076
Shipping Address
Bill Agile
4124 Central Pioke
HERMITAGE, TN 37076
Credit Info
Credit Limit: $0.00
Available Credit: $0.00
Account Balance: ($20.00)
Deferred Balance: $0.00
Payment Information
Amount 20.00
(Choose Method)
(Choose Method)
Cash
Discover
Gift Card - Film Cash
MasterCard
Visa
Apply Account Balance up to ($20.00)
(Mo.) (Year)
Security Code
Training Mode Active
Summary Info
Transaction Number: 78312
$20.00
$0.00
$0.00
$0.00
$0.00
Donations: $0.00
Tax: $0.00
Total: $20.00
Minimum Due: $20.00
Current Payments
Payment Total: $0.00
Current Balance Due: $20.00
Apply Payment
Finalize
$1
$5
$10
$20
$50
$100
Exact Change
Void Selected

Image 9