

Thomas (Wild Apricot)

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Wild Apricot Workflow on How to Use a Credit in One's Membership Account:

If a user is registering for an event or paying for membership, if they click on the 'pay online' button, they will be directly taken to the payment gateway and will not be able to apply the credit.

Instead, if they click 'invoice me', they can go back to their profile and click on Invoices and payments tab (see screenshot below on my test account). In this example, the event registration fee is \$12 and credit on file is \$25, check both options and click settle:

The screenshot shows the 'Invoices and payments' tab selected in the user's profile. A yellow banner at the top indicates a balance due of \$0.00 for 2 items, with a 'SETTLE' button. Below this is a table of transactions:


Date	Transaction	Balance due
2020-06-05	Invoice #00098 Event registration Spring Gala	\$12.00
2020-06-05	Payment Credit Card	\$25.00

Once you click settle, the invoice will be marked as settled/paid:




The screenshot shows the 'Invoices and payments' tab after settling. A yellow banner at the top indicates a balance of -\$13.00 (Overpayment). Below this is a table of transactions:

Date	Transaction	Balance due
2020-06-05	Payment Credit Card	\$13.00
2020-06-05	Invoice #00098 Event registration Spring Gala	\$12.00 Settled Paid: 2020-06-05

If the invoice amount is higher than credit, by checking both credit and invoice, click on Pay online button:

 Balance due (2 items): **\$67.00**

TEST TEST



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Records found: 3

Date	Transaction	Balance due <input checked="" type="checkbox"/>
2020-06-05	Invoice #00099 Event registration Spring Gala	\$80.00 <input checked="" type="checkbox"/>
2020-06-05	Payment Credit Card	\$13.00 <input checked="" type="checkbox"/> Invoice #00098

That will show the correct amount to pay after applying the credit. Hope this helps.

If you have any questions regarding this, please feel free to follow up. Have a great weekend and stay safe!

Regards,

Thomas

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