Customer Allowable & Default Payments
AV Ref # 747

About:

Your customers can be be set for allowable and default payment types. This accomplished two objectives:

- Educate your sales staff the payments that are acceptable for the customer.
- Help speed up ticket processing

This feature is typically used for high-volume operations, typically wholesale. Please advise HITS Technical Support if you would like this feature activated.

How:

This document will cover the setup and use of this feature, including:

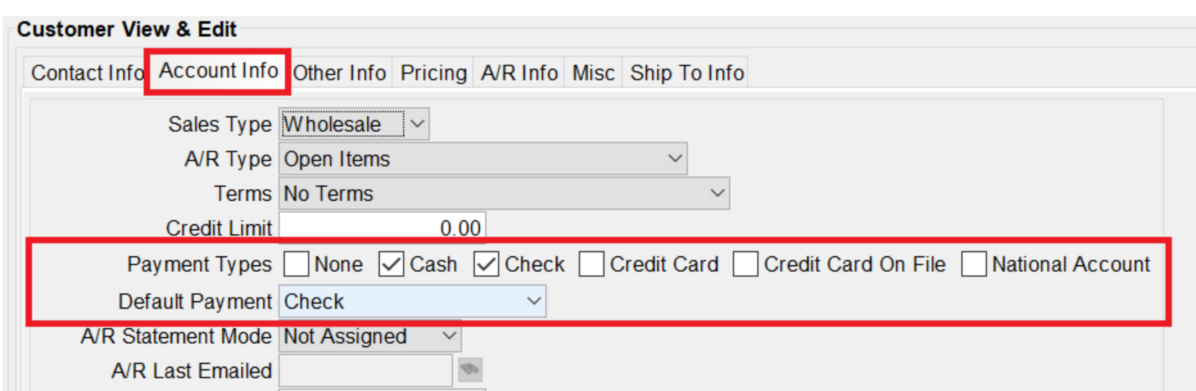
A. Setting allowable and default payments for customers
B. Auto-applying payments

A. Set Allowable and Default Payments for customers

You can set allowable and default payment types for customers. Allowable payments are payments that can be accepted for a customer. Default payment is the “auto-apply” payment that will be made when ticket is closed.

To set allowable and default payments, go to:

Customer (Menu) > **View /Edit** > **Account Info** (Tab)



The other settings in the customer's file (Account Info) will continue to work as normal. (The other settings are not affected by allowable and default payments.)

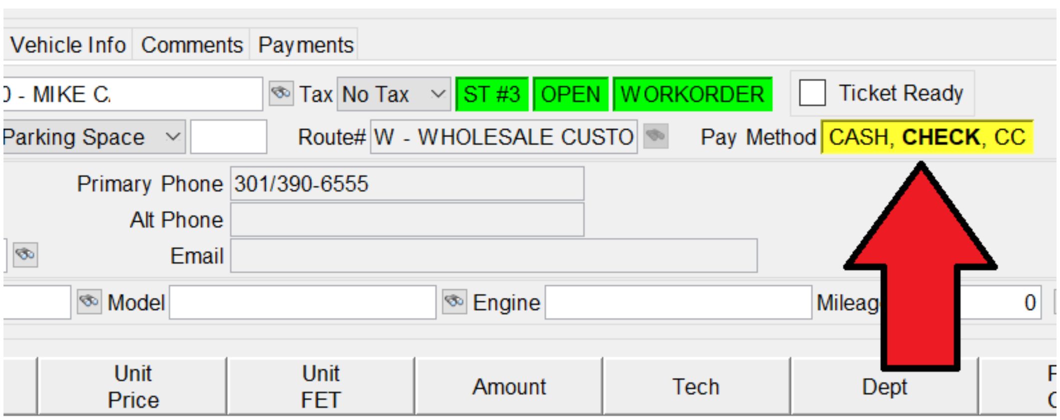
i. For example, if the customer is still set as an Open Items (A/R) account, you *could* still process a sale to this customer as an A/R charge, even if the default payment was, for example, CHECK.

ii. Another example, if you set the customer's account for COD Lock = YES, tickets could not be finalized closed (Invoice) unless cash, check, or credit card payment was tendered.

To help alert your sales staff about the customer's allowable and default payments:

1. The allowable payments will print on the customer's Invoice.

2. The allowable payment also be shown on the Main Tab of the ticket. The **default payment** will be shown in **bold**.



B. Auto-apply payments

If your system has been set for "auto-apply" of payments…

Your sales staff can CLOSE the ticket without entering payment information.

When the Salesrep clicks the PRINT & CLOSE or CLOSE button, the customer's default payment will be automatically applied to the ticket.