Charge Transactions

Andrew:
Alright your total comes to 99.99, how would you like to pay?

Customer:
Just charge it to my account, please.

Andrew:
Sure… That will work… just… let me see here… no…is it here?... One Second please…
Robert, how do you charge a transaction?

Robert:
In House Charge Transactions allow customers to make purchases and pay later when we send them a notice at the end of the billing cycle. The customer must be set up as an In-House Charge customer ahead of time.
Terry is already set up, so let me show you how to charge it. Select a topic, and I'll show you how it works.

Topics

- Post Screen
- Totals Screen

Post Screen

Eagle allows you to extend credit to some or all of your customers using In-House Charge Accounts.

Customers with charge accounts can purchase and pay based on their credit terms.

A charge account allows them to postpone payment until you send a statement at the end of your billing cycle.

Select a customer for the transaction.

Then, confirm the purchaser's authorization to make a charge for their company.

With the Customer Field selected, choose Menu Kpad and select Enter Charge Authorization.

Select the appropriate name from the list and choose OK.

You can add a temporary name to the list if needed, but make sure to call the customer to verify.

Otherwise, your Accounts Receivable clerk is typically the person who adds names to the Charge Authorization list.

When you finish adding items to the order, continue to the Totals Due screen as usual.

Totals Screen

Ask the customer if they want to charge the entire amount or a part of it.

If they're charging the entire amount, just press the Enter key; otherwise, enter the correct amounts in the corresponding fields first.

Eagle prompts for a signature.

When the customer signs on the electronic signature pad, select OK to confirm.

If you do not have a signature pad or for some reason the customer cannot sign, choose Cancel and follow the prompt for a list of override options.

With the signature or override accepted, Eagle completes the In-House Charge transaction.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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