Credit Memos

Highlighting the Credit Memos tree option will display the customer's entire Credit Memo history in the Active Pane. If the Balance column of the Credit Memo equals zero, this credit memo has been fully applied to invoices.

A Credit Memo may be opened for viewing by double-clicking on the Credit Memo row in the Active Pane. User permissions are required for this option; if the User does not have the appropriate permissions, a Credit Memo record may not be accessed.

☐

Right-clicking on the Credit Memos option will display a list of three options; Apply, New Credit Memo, and Refresh Credit Memo.

- Apply - If the customer has unapplied credit memos on their account, this option may be used to apply credits to open invoices. User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.
- New Credit Memo – A new Credit Memo may be created by selecting this option. User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.
- Refresh Credit Memo – Selecting this option will refresh the Credit Memo list displayed in the Active Pane.

☐