

Credit Off Invoice

Last Modified on 01/20/2023 11:00 am EST

When highlighting an Invoice and selecting the right-click option of Credit Off Invoice, a message will be displayed confirming you want to credit off the entire invoice. If the User selects the Yes button, a Credit Memo will be created using the same invoice items and/or parts that were on the original invoice. The Credit Memo will automatically be applied to the Invoice. If this option is selected for an Invoice that has partially been paid, the User must select a GL Account to use for crediting off the balance of the Invoice.

If the User does not have the appropriate permissions, this option will not be available.

The Credit Off Invoice option is not available to companies using Credit Requests.

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