

# Create Credit From

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

When highlighting an Invoice and selecting the right-click option of Create Credit From, 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 then be displayed on the screen where the User may select a Credit Reason and enter any notes into the memo field. After saving the Credit Memo, the User would then manually apply the Credit Memo to the Invoice.

Note: If inventory parts were on the invoice being credited, no change will be made to the inventory for the part(s). If the part was not used, you will need to perform a miscellaneous return to stock transaction to adjust the inventory.

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

The Create Credit From option is not available to companies using Credit Requests.

- 
-