User Group Security-Credit Memos

For a User to be able to create a Credit Memo, certain security privileges must be granted to the User through the User Group Security options within SedonaSetup. The following User Group Security options located within the AR Application Access section pertain to Credit Memos.

- Credit Memo – permits the User to create a credit memo.
- Credit Off Invoices – permits the User to credit off an entire invoice (right-click function).
- Apply Individual Cash/Credit – permits the User to apply unapplied cash or a credit memo to an invoice with an open balance.
- Ability to Credit Off Partial Invoice – permits the User to credit off an invoice where a partial payment has been applied to an invoice. When using this option the User must select a G/L account for the debit side of the transaction.
- Ability to assign future auto apply for credit – permits the User to select which types of future generated invoices the credit memo will be applied to automatically when an invoice of the selected type(s) is posted.