

Create Credit From

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The Create Credit From option will create a Credit Memo using the same Invoice Items and/or Parts that were used on the invoice being credited-off but not automatically apply the Credit Memo to the invoice. The application of the Credit Memo to the invoice will have to be done manually by the User. Using this option allows the User to enter a note in the Memo field of the Credit Memo prior to saving.

1. Open the Customer Explorer for the desired customer. In the Active Pane under the heading of Open Invoices, highlight the Invoice number to be credited off; right-click and select the Create Credit From option.
2. A message will be displayed asking you if you are sure you want to create a credit for the invoice. Click the Yes button to accept.
3. The Credit Memo form will be displayed where you will need to select a Credit Reason and may enter an optional note in the Memo field. Once finished, click the Save button located at the lower right of this form.
4. You will then need to manually apply the Credit Memo to the invoice for which the credit was generated. To accomplish this, follow the steps found in [Applying a Credit Memo to an Invoice](#).