Create a Credit Request Overview and Topics

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There are five different types of Credit Requests from which the User may choose depending on the situation. Each of the types are listed below. For instructions on how to use each Credit Request Type, click on the links below.

- Credit Template - The User creates a Credit Template selecting which Invoice Items and/or Parts are to be used for the Credit Memo. Once the credit request has been approved and turned into a credit memo, it may be applied to invoices or remain on the customer's account for future application.
- Credit for one Particular Invoice - Select an invoice on the customer's account for which the Credit Memo will be generated.
- Credit for a Job Invoice – This method is similar to creating a Credit for a Particular Invoice. The only difference is where you begin the Credit Request. The Credit Request must be initiated from a Job record.
- Credit for one Particular Invoice and Invoice Another Customer - Select an invoice on the customer's account for which the Credit Memo will be generated and automatically create an invoice on another customer's account using the same Invoice Items that were used on the originating customer's Invoice that is being credited off. This feature would be used if the incorrect customer was invoiced in error.
- Credit Request for a Partially Paid Invoice – The process for this type of credit request is the same as processing a credit for one particular invoice. The only difference is at the end of the process, the user will be required to select a G/L Account for writing off the balance of the invoice.
- Sales Tax Correction – This option would be used if:
    - The incorrect amount of sales tax was charged on an invoice (incorrect tax group was setup on the site)
    - Tax was charged on the invoice where it should have been exempt
    - No tax was charged on the invoice that should have been taxed