Create a Credit Request-One Particular Invoice & Invoice Another Customer

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A User may create a Credit Request for a selected invoice on a customer account and at the same time select a different customer for which you want to create a new invoice. Using this option, the application credits off the invoice on one customer and automatically creates an invoice for a different customer using the same Invoice Items and/or Parts that were used on the originating customer's invoice. This feature would be used if you accidentally invoiced the incorrect customer.

There are three ways to begin the new Credit Request; all options are listed below.

1. Begin The Credit Request:

- Navigate to the Main Application Tree and select Accounts Receivable/Credit Request option, then click the New button located at the lower right of the Credit Request List.
- Navigate to a Customer Explorer record; select Credit Requests from the customer tree; right-click and select the New Credit Request option.
- Navigate to a Customer Explorer record; within the Active Pane, highlight an open invoice then right-click and select the New Credit Request option. If this option is used, skip steps 2 and 3.

2. Select the Customer - Once the Credit Request form is displayed, select the Customer number for the request. If the Credit Request was started from the Customer Explorer, the customer number will automatically be populated.

3. Select the Invoice Number - In the Invoice# field, select the Invoice to be credited off from the drop-down list.

4. Select the Customer to Invoice - Select the checkbox Invoice Issued to Wrong Customer which is located to the right of the customer name display box, and enter or lookup the customer number for which a new invoice will be created. Note: A new invoice will not be created for the selected customer until the Credit Memo is generated for the Credit Request being processed.
5. Fill in the Credit Request form – Once the invoice number has been selected, the Requested Amount will automatically fill in with the amount of the Invoice. Enter the remaining information on the Credit Request form.
Reason – This is a required field; select the Credit Reason from the drop-down list in this field.
Memo – The User may enter a note in the Memo field to describe why the invoice balance is being requested for a credited-off. This field is optional. If the Credit Memo is to be printed and sent to the Customer, this information will be printed.
Assigned To – This may automatically fill with the next User who is responsible for signing-off on the Credit Request. If this field does not auto fill, the User may select a name from the drop-down list to which the Credit Request will be assigned for further processing. If the User creating the Credit Request has the appropriate permissions, the credit memo may be generated by pressing the Save button located at the lower right of the form.

6. Sign Off and Generate Credit and New Invoice – Click the Sign off button then click the Save button located at the bottom of the form. If the User does not have permissions to generate credit memos, the Credit Request will appear in the Credit List for processing by another User with the appropriate permissions. In this example, the User does have permission to generate the credit.
After clicking the Save button, a message will be displayed confirming you want to credit off the balance of the invoice; click the Yes button to proceed.

Once the credit memo has been generated, a new Invoice is automatically created and posted for the new customer to be invoiced. The same Invoice Items and/or Parts that were on the original invoice that was credited off are used to build the new invoice.
It is a good practice to open the newly created invoice to review the information and make any necessary changes. You may flag the invoice to go to the printing queue and change or enter additional information into the Memo field. When finished, click the Save button located at the lower right of the invoice form to save any changes made to the new invoice. Permissions are required to be able to make changes to the invoice.

New Invoice Created by the Credit Request process