

Managing Credit Requests

Last Modified on 01/09/2023 4:42 pm EST

The Credit Request List

Once Credit Requests are created, they will remain in the Credit Request List until signed off and a Credit Memo is generated or closed without generating a Credit Memo. Once the Credit Memo is generated, the Credit Request is automatically marked as closed and is removed from the list.

If the User does not have security permissions to view all Credit Requests, the Credit Request list will display only the Credit Requests created by the User logged into SedonaOffice.

There are also filter fields located in the header of the Credit Request List enabling the User to view a list of Credit Requests that meet certain criteria. These filter fields are:

- Requested by – This field displays the User code of the employee that created the Credit Request.
- Date fields – Specify a date range on which a Credit Request was created.
- Credit Reason – The User may select all or one particular reason code from the drop-down list. If one reason code is selected, only Credit Requests saved with the selected reason code will display in the list.

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Viewing Closed Credit Requests

At the lower left of the Credit Request List is a Show Closed checkbox. By selecting this checkbox, all Credit Requests that are open and closed will be displayed on the list. The User may click on any of the column titles to re-sort the list in the manner desired.

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Close a Credit Request without Generating a Credit Memo

If it is determined that a Credit Memo will not be generated for the Credit Request, it may manually be closed by selecting the Closed checkbox located at the lower left of the Credit Request form and pressing the Save button on the Credit Request form. Manually closed Credit Requests will automatically drop off the open Credit Request listing. It is a good practice for the person declining the Credit Request to click the Sign-Off button, change the amount to zero, and type in a note as to why the credit will not be provided to the customer.

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