

# Close a Credit Request

Last Modified on 01/20/2023 11:10 am EST

## **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.

□