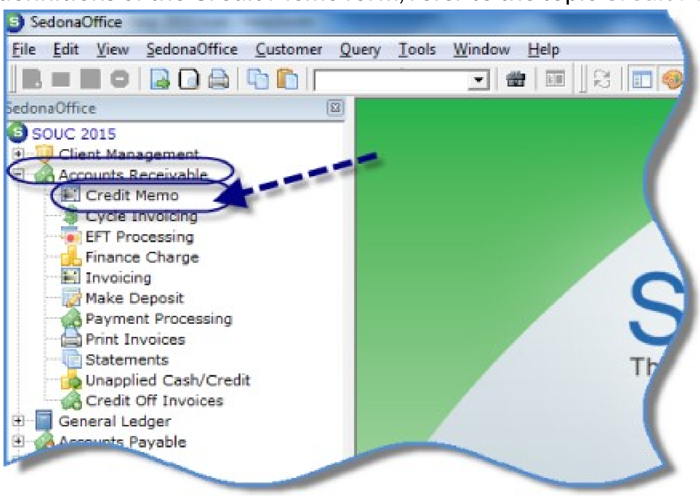
# Creating a credit memo

Last Modified on 01/09/2023 4:53 pm EST

## Begin a Credit Memo From Accounts Receivable

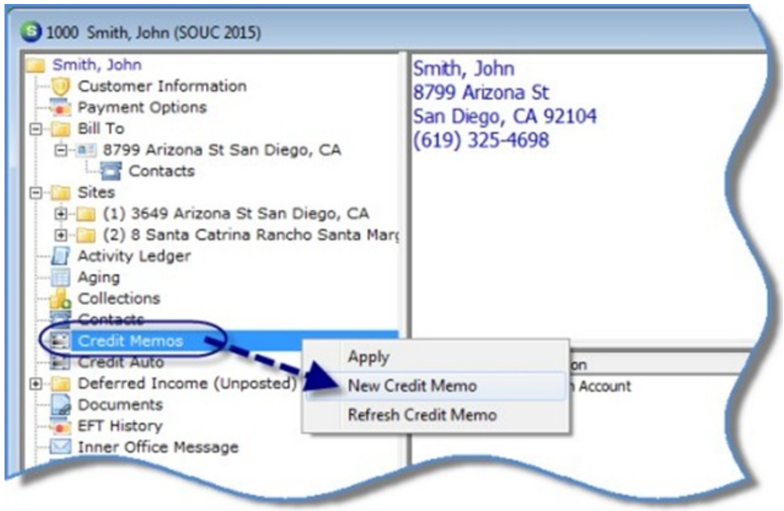
To begin a Credit Memo from the Accounts Receivable main menu, click on the Credit Memo option within the Accounts Receivable menu. A blank Credit Memo form will be displayed. Enter or search for the desired Customer Number. If the Customer has more than one Site record, a list will be displayed from which the User must make a selection. Fill in the appropriate fields on the form; click the Save button when finished. For individual field definitions of the Credit Memo form, refer to the topic Credit Memo Form Definitions for more information.

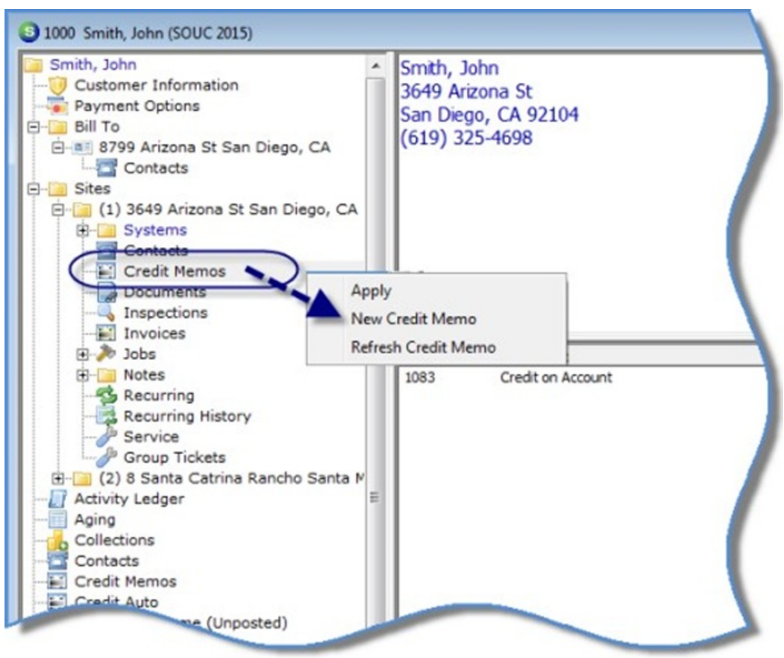



## Begin a Credit Memo From the Customer Explorer

To begin a Credit Memo from a Customer Explorer record, click on the Credit Memo option within the Customer Tree, right-click then select the New Credit Memo option. If the Customer has more than one Site, the User will be prompted to select the desire Site. Alternately, if the Customer has more than one Site, navigate to the options within the Site tree and begin the Credit Memo at the Site level.

Note: If the customer has any previously created credit memos on their account, when highlighting Credit Memos from the Customer Tree at either the Customer level or Site level, you may highlight a credit memo in the Active Pane, right-click and select New Credit Memo.


1000 Smith, John (SOUC 2015)
Smith, John
Customer Information
Payment Options
Bill To
8799 Arizona St San Diego, CA
Contacts
Sites
(1) 3649 Arizona St San Diego, CA
Activity Ledger
Aging
Collections
Credit Memos
Deferred Income (Unposted)
Documents
EFT History
Inner Office Message
Apply
New Credit Memo
Refresh Credit Memo
Smith, John
8799 Arizona St
San Diego, CA 92104
(619) 325-4698


1000 Smith, John (SOUC 2015)
Smith, John
Customer Information
Payment Options
Bill To
8799 Arizona St San Diego, CA
Contacts
Sites
(1) 3649 Arizona St San Diego, CA
Systems
Credit Memos
Inspections
Invoices
Jobs
Notes
Recurring
Recurring History
Service
Group Tickets
Activity Ledger
Aging
Collections
Contacts
Credit Memos
Apply
New Credit Memo
Refresh Credit Memo
Smith, John
3649 Arizona St
San Diego, CA 92104
(619) 325-4698
1083
Credit on Account