Credit Off Invoice

The *Credit Off Invoice* option allows a User to credit off the entire balance of an invoice; this function will create a Credit Memo using the same Invoice Items and/or Parts that were used on the invoice being credited-off. The Credit Memo is then automatically applied to the invoice to pay off the entire invoice. When using this option, you do not have the opportunity to immediately enter a note in the *Memo* field or select a *Credit Reason* for the Credit Memo. If notes are needed, the you may re-open the Credit Memo automatically generated, enter the note in the memo field then re-save. User permissions (SedonaSetup/User Group Security/AR/Edit existing transactions) are required to edit a Credit Memo after it has been saved.

A User with the proper security permissions may Credit Off the entire balance of an invoice. When performing this function, the application will create a Credit Memo using the same Invoice Items and/or parts that were on the invoice being crediting-off. The Credit Memo is then automatically applied to the invoice to pay off the entire invoice. To credit off the entire balance of an invoice follow the steps below.

Note: If payments or credits have previously been applied to the invoice, the process is different from what is described on this page. Refer to the topic Credit Off a Partially Paid Invoice for instructions.

1. Open the Customer Explorer for the customer for which the Credit Off feature will be used. In the Active Pane under the heading of *Open Invoices*, highlight the Invoice to be credited off; right-click and select the *Credit Off Invoice* option.

2. A message will be displayed asking the User if you are sure you want to credit off the balance of the invoice. Click the *Yes* button to accept.