Create Credit From

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The *Create Credit From* option creates a credit memo using the same invoice items or parts (or both) that were used on the invoice being credited-off but does not automatically apply the credit memo to the invoice. The application of the credit memo to the invoice must be done manually as a separate step. Using this option allows you to enter a note in the *Memo* field and select a *Credit Reason* for the Credit Memo prior to saving.

1. Open the Customer Explorer for the desired customer. In the Active Pane under the heading of *Open Invoices*, highlight the Invoice number to be credited off; right-click and select the *Create Credit From* option.
2. A message opens asking you if you are sure you want to create a credit for the invoice. Click the *Yes* button to accept.
3. The Credit Memo form opens where you need to select a *Credit Reason* and can enter an optional note in the **Memo** field. Once finished, click the **Save** button located at the lower right of this form.
4. Manually apply the credit memo to the invoice for which the credit was generated. To accomplish this, follow the steps found in Applying a Credit Memo to an Invoice.