

# Create Credit From

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

The *Create Credit From* option will create a Credit Memo using the same Invoice Items and/or Parts that were used on the invoice being credited-off but not automatically apply the Credit Memo to the invoice. The

application of the Credit Memo to the invoice will have to be done manually by the User 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.

For instructions on how to use each of these functions, follow the topic links below.

## How to "Create Credit From"

The *Create Credit From* option will create a Credit Memo using the same Invoice Items and/or Parts that were used on the invoice being credited-off but not automatically apply the Credit Memo to the invoice. The application of the Credit Memo to the invoice will have to be done manually by the User. Using this option allows the User to enter a note in the *Memo* field of 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 will be displayed 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 will be displayed where you will need to select a *Credit Reason* and may enter an optional note in the *Memo* field. Once finished, click the *Save* button located at the lower right of this form.
4. You will then need to 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](#).