

Credit Request Activation

Last Modified on 01/09/2023 4:55 pm EST

Prior to using the Credit Requests functionality the *Credit Request Processing* Option must be activated in SedonaSetup. Navigate to the SedonaSetup AR Setup Processing form; on this form is a checkbox labeled *Use Credit Request Processing*. Select this checkbox and click the Apply button. When selecting this option a second checkbox on this form, *Require Credit Reason on Credit Memos*, is automatically selected and cannot be de-selected. Once this function is activated Users will only be able to generate Credit Memos by using the Credit Requests Process.

The screenshot displays the 'Setup Processing' form in SedonaSetup. The 'Invoicing and Credits' section is highlighted with a blue dashed arrow pointing to the 'Use Credit Request Processing' checkbox, which is checked. Below it, the 'Require Credit Reason on Credit Memos' checkbox is also checked. The 'Numbering' section shows 'Auto Invoice' and 'Auto Customer' checked, with 'Next Invoice' set to 1088 and 'Next Customer' set to 1017. The 'Auto Job Number' and 'Next Job Number' are also checked and set to 2017. The 'Other' section shows 'GL Categories required for Income and Expenses' checked, and 'Group Deferred Revenue By' set to 'Item Type'.

Section	Option	Status	
Numbering	Auto Invoice	<input checked="" type="checkbox"/>	
	Next Invoice	1088	
	Auto Customer	<input checked="" type="checkbox"/>	
	Next Customer	1017	
Auto Job Number	Auto Job Number	<input checked="" type="checkbox"/>	
	Next Job Number	2017	
Require System Account	Require System Account	<input type="checkbox"/>	
	Require Unique System Account Company Wide	<input type="checkbox"/>	
	Invoicing and Credits	Cycle Beginning Day	<input checked="" type="radio"/> First Day of Month <input type="radio"/> Day of Service Start
		Print Customer Number on Invoices and Statements	<input checked="" type="checkbox"/>
Allow Printed Invoices to be Edited		<input checked="" type="checkbox"/>	
Enter Separate Posting Date for Invoices and Credits		<input type="checkbox"/>	
Allow direct invoicing to Master Account	<input checked="" type="checkbox"/>		
Use Credit Request Processing	<input checked="" type="checkbox"/>		
Require Credit Reason on Credit Memos	<input checked="" type="checkbox"/>		
Other	GL Categories required for Income and Expenses	<input checked="" type="checkbox"/>	
	Group Deferred Revenue By	<input type="radio"/> GL Account <input checked="" type="radio"/> Item Type	