

Credit Request Set Up

Last Modified on 01/09/2023 4:56 pm EST

The *Credit Reason* field automatically becomes a required field that must be selected on the *Credit Request* form. Make certain a list of *Credit Reasons* have been created prior to activating the Credit Request process. The list of *Credit Reasons* is entered and maintained in SedonaSetup by your company. Some sample Credit Reason are delivered with your database.

The screenshot shows a software window titled "Credit Reason". It contains a table with three columns: "Credit Reason", "Description", and "Inactive". Below the table is a checkbox labeled "Include Inactive". At the bottom, there is a "Credit Reason Edit" section with two input fields for "Credit Reason" and "Description", and an "Inactive" checkbox. At the very bottom are three buttons: "Apply", "New", and "Delete".

Credit Reason	Description	Inactive
3rd Party Dealer Payments	3rd Party Dealer Payments	N
Bad Debt	Bad Debt	N
Goodwill	Goodwill	N
Install-Over Invoiced	Install-Over Invoiced	N
Installation Issues	Installation Issues	N
Invoiced in Error	Invoiced in Error	N
Referral	Referral	N
Sales Tax Correction	Sales Tax Correction	N
Service Issues	Service Issues	N
Service-Over Invoiced	Service-Over Invoiced	N
Suspend Service	Suspend Service	N
Write-Off - Cancel	Write-Off Customer Cancelled	N

Include Inactive

Credit Reason Edit Inactive

Credit Reason:

Description:

Apply New Delete