

Credit Request Sign Off

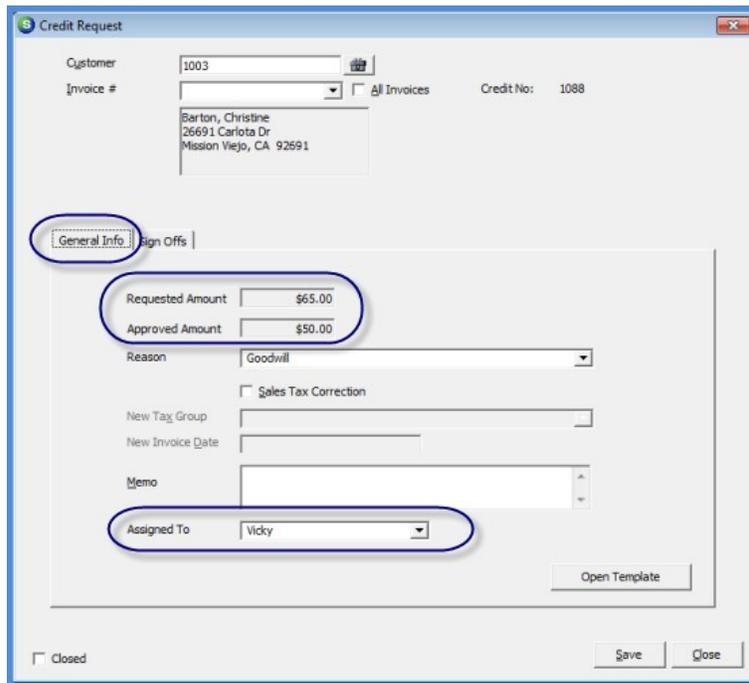
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Once you have setup your employees and User Group Credit Memo limits and User Group security options you may begin using Credit Requests. This section describes the flow of a Credit Request from the creation of a Credit Request to the final generation of the Credit Memo on the customer's account. In the example provided, we are using a three step sign-off process using a Credit Template.

For step by step instructions on creating Credit Requests, follow the topic links found on the [Credit Requests Overview](#) page.

Create a Credit Request & First Sign-off

In the screen shot below, a Credit Request was created using a Credit Template by the lowest approval level User Amanda. Amanda's User Group security only allows her to approve a Credit Request for up to \$50.00. Since the Credit Request amount is for \$65.00, when Amanda clicked the Sign-Off 1 button, the amount defaulted to her maximum Credit Memo approval amount which is \$50.00. The next employee to whom the Credit Request is assigned may accept, increase or decrease the approved amount of the original requested amount.



The screenshot shows a 'Credit Request' window with the following fields and values:

- Customer: 1003
- Invoice #: [Dropdown]
- All Invoices:
- Credit No: 1088
- Customer Address: Barton, Christine, 25669 1 Carlota Dr, Mission Viejo, CA 92691
- Sign Offs: [Tabbed Section]
- Requested Amount: \$65.00
- Approved Amount: \$50.00
- Reason: Goodwill
- Sales Tax Correction:
- New Tax Group: [Dropdown]
- New Invoice Date: [Text Field]
- Memo: [Text Area]
- Assigned To: Vicky
- Buttons: Open Template, Save, Close
- Footer: Closed

Credit Request

Customer: 1003
Invoice #: [dropdown] All Invoices Credit No: 1088
Barton, Christine
26691 Carlota Dr
Mission Viejo, CA 92691

General Info | Sign Offs

Sign Off Detail

Sign Off 1	Amanda	1/22/2015 5:26:10 AM	Amount: 50.00
Notes	customer unhappy with service technician.		
Sign Off 2			Amount: []
Notes	[]		
Sign Off 3			Amount: []
Notes	[]		

Maximum Approval Amount 50.00

Closed