

Create a Credit Request using the Credit Template

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When creating a Credit Request using a *Credit Template*, the User may select any Invoice Item and/or Parts. The User Group security controls the amounts for which the User will be able to sign-off. The Credit Template assigns the next invoice number available to the Credit Request, but an actual Credit Memo is not posted to the general ledger until a User with the appropriate permissions approves and presses the *Save* button to generate the Credit Memo.

1. To begin a new Credit Request, navigate to the main module tree and select Accounts Receivable/Credit Request or navigate to a Customer Explorer record; select Credit Requests from the customer tree; right-click and select *New Credit Request*.
2. Select the Customer - Once the *Credit Request* form is displayed, the User will select the customer for the request. If the Credit Request was started from the Customer Explorer, the customer number will automatically be populated.

The screenshot shows a software window titled "Credit Request". At the top, there is a "Customer" field with the value "1003" and a search icon. Below it, a dropdown menu is open, displaying the customer name and address: "Barton, Christine", "26691 Carlota Dr", "Mission Viejo, CA 92691". To the right of the customer field, the "Credit No:" is "1088". Below the customer information, there are two tabs: "General Info" (selected) and "Sign Offs". The "General Info" section contains several fields: "Requested Amount" with a value of "\$65.00", "Approved Amount" with a value of "\$50.00", "Reason" with a dropdown menu set to "Goodwill", a checkbox for "Sales Tax Correction" which is unchecked, "New Tax Group" with an empty text box, "New Invoice Date" with an empty date field, "Memo" with a large empty text area, and "Assigned To" with a dropdown menu set to "Vicky". At the bottom right of the form is an "Open Template" button. At the bottom left of the window is a "Closed" checkbox, and at the bottom right are "Save" and "Close" buttons.