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.