

Creating a Credit Request for a specific Invoice

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A User may enter a Credit Request and specify a particular customer invoice for which a credit memo will be generated. This may be done for invoices that have or have not been partially paid with a customer payment or a Credit Memo. For the User to be able to create a Credit Request for a partially paid invoice, the *Ability to Credit Off Partial Invoices* User Security Option must be activated for the User Group assigned to the User creating the Credit Request.

For invoices where no payments or credits have been applied, once the Credit Request has gone through the sign-off process, the Credit Memo is created and automatically applied to the invoice number entered in the Credit Request form. User Group Security controls the amounts that will be allowable for the final Credit Memo. 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.

For invoices where payments or credits have already been applied, once the Credit Request has gone through the sign-off process, the User generating the credit will be prompted to write off the balance of the invoice to a miscellaneous G/L account number. If your company does not want to allow Users to write off an invoice to a Miscellaneous G/L Account, the Credit Template method should be used in partially paid invoice situations.

There are three ways to begin a new Credit Request for a specific Invoice; all options are listed below.

1. Begin The Credit Request:

- Navigate to the Main Application Tree and select Accounts Receivable/Credit Request option, then click the *New* button located at the lower right of the Credit Request List.
- Navigate to a Customer Explorer record; select Credit Requests from the customer tree; right-click and select the *New Credit Request* option.
- Navigate to a Customer Explorer record; within the Active Pane, highlight an open invoice then right-click and select the *New Credit Request* option.