

Create a Credit Request for a Job Invoice

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The process is almost identical to creating a Credit Request for a specific invoice; the only difference is where the User begins the Credit Request.

1. Open the Job record for which a Job Invoice must be credited.
2. Within the Job record, click on the Tools button on the Job Toolbar.
3. From the Tools Toolbar, click on the Invoicing button. To the right a list of all Job Invoices and Credits (if any) will be displayed.
4. Highlight the Invoice to be credited, right-click and select the "Create Credit Request" option.

For the remainder of the process, follow steps 4 through 6 found under the topic [Creating a Credit Request for an Invoice](#).

The screenshot displays a software interface for job management. The top section shows job details for 'Job - 2012 (St. Elizabeth Ann Seton Catholic Church(Sch/Off))'. Below this is a table with columns for Job, Customer, and Site. The 'Invoicing' section contains a table of invoices. A callout box highlights the 'Create Credit Request' option in a context menu that appears over the first invoice row.

Job	Customer	Site
Job Number: 2012	1007	St. Elizabeth Ann Seton Catholic
Job Type: Integrated-Com		9 Hilgate
Job Status: Scheduling		Irvine, CA 92612
System: Integrated-1007A		(949) 750-3300
Labor Units: 80 (0 Used)		

Invoice #	Date	Desc	Amount	Net Due
1097	1/22/2015	Installation Services	11,309.75	0.00

Right-click on Invoice then select the Create Credit Request Option.

- Create Credit Request
- Print Job Progress Invoice