Managing Credit Requests

Last Modified on 01/09/2023 4:58 pm EST

Once Credit Requests are created, they will remain in the Credit Request List until signed off and a Credit Memo is generated or closed without generating a Credit Memo. Once the Credit Memo is generated, the Credit Request is automatically marked as closed and is removed from the list.

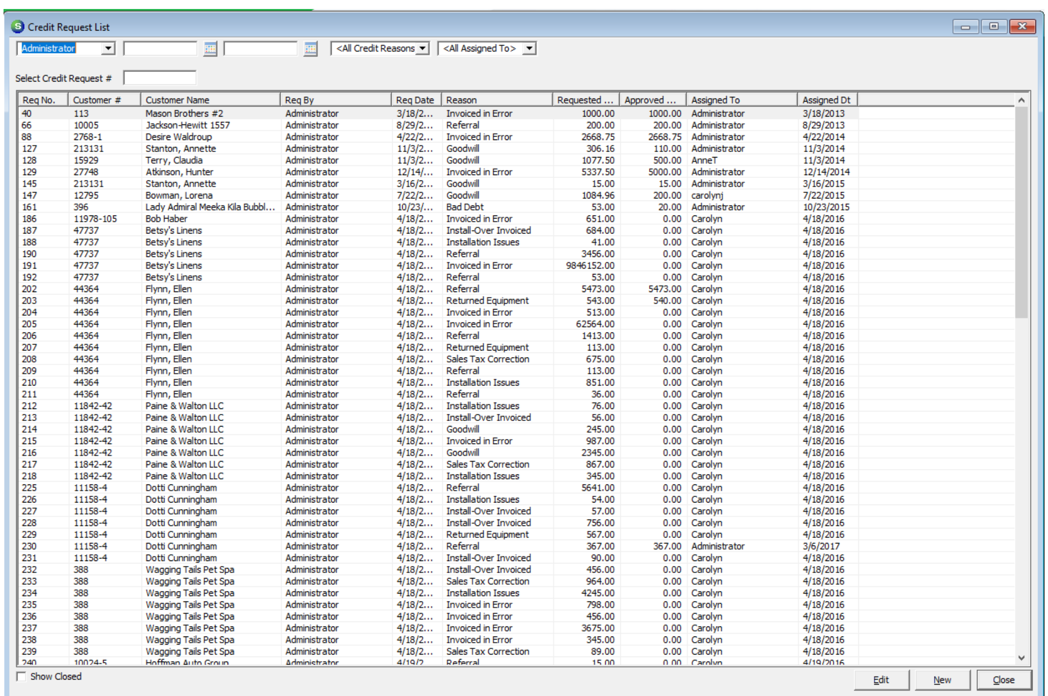
If the User does not have security permissions to view all Credit Requests, the Credit Request list will display only the Credit Requests created by the User logged into SedonaOffice.

There are also filter fields located in the header of the Credit Request List enabling the User to view a list of Credit Requests that meet certain criteria. These filter fields are:

Requested by – This field displays the User code of the employee that created the Credit Request.

Date fields – Specify a date range on which a Credit Request was created.

Credit Reason – The User may select all or one particular reason code from the drop-down list. If one reason code is selected, only Credit Requests saved with the selected reason code will display in the list.



Req No.	Customer #	Customer Name	Req By	Req Date	Reason	Requested ...	Approved ...	Assigned To	Assigned Dt
40	113	Mason Brothers #2	Administrator	3/18/2...	Invoiced in Error	1000.00	1000.00	Administrator	3/18/2013
66	10005	Jackson-Hewitt 1557	Administrator	8/29/2...	Referral	200.00	200.00	Administrator	8/29/2013
88	2768-1	Desire Waldroup	Administrator	4/22/2...	Invoiced in Error	2668.75	2668.75	Administrator	4/22/2014
127	213131	Stanton, Annette	Administrator	11/3/2...	Goodwill	306.16	110.00	Administrator	11/3/2014
128	15929	Terry, Claudia	Administrator	11/3/2...	Goodwill	1077.50	500.00	AnneT	11/3/2014
129	27748	Atkinson, Hunter	Administrator	12/14/...	Invoiced in Error	5337.50	5000.00	Administrator	12/14/2014
145	213131	Stanton, Annette	Administrator	3/16/2...	Goodwill	15.00	15.00	Administrator	3/16/2015
147	12795	Bowman, Lorena	Administrator	7/22/2...	Goodwill	1084.96	200.00	carolynj	7/22/2015
161	396	Lady Admiral Meeka Kila Bubbl...	Administrator	10/23/...	Bad Debt	53.00	20.00	Administrator	10/23/2015
186	11978-105	Bob Haber	Administrator	4/18/2...	Invoiced in Error	651.00	0.00	Carolyn	4/18/2016
187	47737	Betsy's Linens	Administrator	4/18/2...	Install-Over Invoiced	684.00	0.00	Carolyn	4/18/2016
188	47737	Betsy's Linens	Administrator	4/18/2...	Installation Issues	41.00	0.00	Carolyn	4/18/2016
190	47737	Betsy's Linens	Administrator	4/18/2...	Referral	3456.00	0.00	Carolyn	4/18/2016
191	47737	Betsy's Linens	Administrator	4/18/2...	Invoiced in Error	9846152.00	0.00	Carolyn	4/18/2016
192	47737	Betsy's Linens	Administrator	4/18/2...	Referral	53.00	0.00	Carolyn	4/18/2016
202	44364	Flynn, Ellen	Administrator	4/18/2...	Referral	5473.00	5473.00	Carolyn	4/18/2016
203	44364	Flynn, Ellen	Administrator	4/18/2...	Returned Equipment	543.00	540.00	Carolyn	4/18/2016
204	44364	Flynn, Ellen	Administrator	4/18/2...	Invoiced in Error	513.00	0.00	Carolyn	4/18/2016
205	44364	Flynn, Ellen	Administrator	4/18/2...	Invoiced in Error	62564.00	0.00	Carolyn	4/18/2016
206	44364	Flynn, Ellen	Administrator	4/18/2...	Referral	1413.00	0.00	Carolyn	4/18/2016
207	44364	Flynn, Ellen	Administrator	4/18/2...	Returned Equipment	113.00	0.00	Carolyn	4/18/2016
208	44364	Flynn, Ellen	Administrator	4/18/2...	Sales Tax Correction	675.00	0.00	Carolyn	4/18/2016
209	44364	Flynn, Ellen	Administrator	4/18/2...	Referral	113.00	0.00	Carolyn	4/18/2016
210	44364	Flynn, Ellen	Administrator	4/18/2...	Installation Issues	851.00	0.00	Carolyn	4/18/2016
211	44364	Flynn, Ellen	Administrator	4/18/2...	Referral	36.00	0.00	Carolyn	4/18/2016
212	11842-42	Paine & Walton LLC	Administrator	4/18/2...	Installation Issues	76.00	0.00	Carolyn	4/18/2016
213	11842-42	Paine & Walton LLC	Administrator	4/18/2...	Install-Over Invoiced	56.00	0.00	Carolyn	4/18/2016
214	11842-42	Paine & Walton LLC	Administrator	4/18/2...	Goodwill	245.00	0.00	Carolyn	4/18/2016
215	11842-42	Paine & Walton LLC	Administrator	4/18/2...	Invoiced in Error	987.00	0.00	Carolyn	4/18/2016
216	11842-42	Paine & Walton LLC	Administrator	4/18/2...	Goodwill	2345.00	0.00	Carolyn	4/18/2016
217	11842-42	Paine & Walton LLC	Administrator	4/18/2...	Sales Tax Correction	867.00	0.00	Carolyn	4/18/2016
218	11842-42	Paine & Walton LLC	Administrator	4/18/2...	Installation Issues	345.00	0.00	Carolyn	4/18/2016
225	11158-4	Dotti Cunningham	Administrator	4/18/2...	Referral	5641.00	0.00	Carolyn	4/18/2016
226	11158-4	Dotti Cunningham	Administrator	4/18/2...	Installation Issues	54.00	0.00	Carolyn	4/18/2016
227	11158-4	Dotti Cunningham	Administrator	4/18/2...	Install-Over Invoiced	57.00	0.00	Carolyn	4/18/2016
228	11158-4	Dotti Cunningham	Administrator	4/18/2...	Install-Over Invoiced	756.00	0.00	Carolyn	4/18/2016
229	11158-4	Dotti Cunningham	Administrator	4/18/2...	Returned Equipment	567.00	0.00	Carolyn	4/18/2016
230	11158-4	Dotti Cunningham	Administrator	4/18/2...	Referral	367.00	367.00	Administrator	3/6/2017
231	11158-4	Dotti Cunningham	Administrator	4/18/2...	Install-Over Invoiced	90.00	0.00	Carolyn	4/18/2016
232	388	Wagging Tails Pet Spa	Administrator	4/18/2...	Install-Over Invoiced	456.00	0.00	Carolyn	4/18/2016
233	388	Wagging Tails Pet Spa	Administrator	4/18/2...	Sales Tax Correction	964.00	0.00	Carolyn	4/18/2016
234	388	Wagging Tails Pet Spa	Administrator	4/18/2...	Installation Issues	4245.00	0.00	Carolyn	4/18/2016
235	388	Wagging Tails Pet Spa	Administrator	4/18/2...	Invoiced in Error	798.00	0.00	Carolyn	4/18/2016
236	388	Wagging Tails Pet Spa	Administrator	4/18/2...	Invoiced in Error	456.00	0.00	Carolyn	4/18/2016
237	388	Wagging Tails Pet Spa	Administrator	4/18/2...	Invoiced in Error	3675.00	0.00	Carolyn	4/18/2016
238	388	Wagging Tails Pet Spa	Administrator	4/18/2...	Invoiced in Error	345.00	0.00	Carolyn	4/18/2016
239	388	Wagging Tails Pet Spa	Administrator	4/18/2...	Sales Tax Correction	89.00	0.00	Carolyn	4/18/2016
240	10024-5	Hoffman Auto Group	Administrator	4/19/2...	Referral	15.00	0.00	Carolyn	4/19/2016