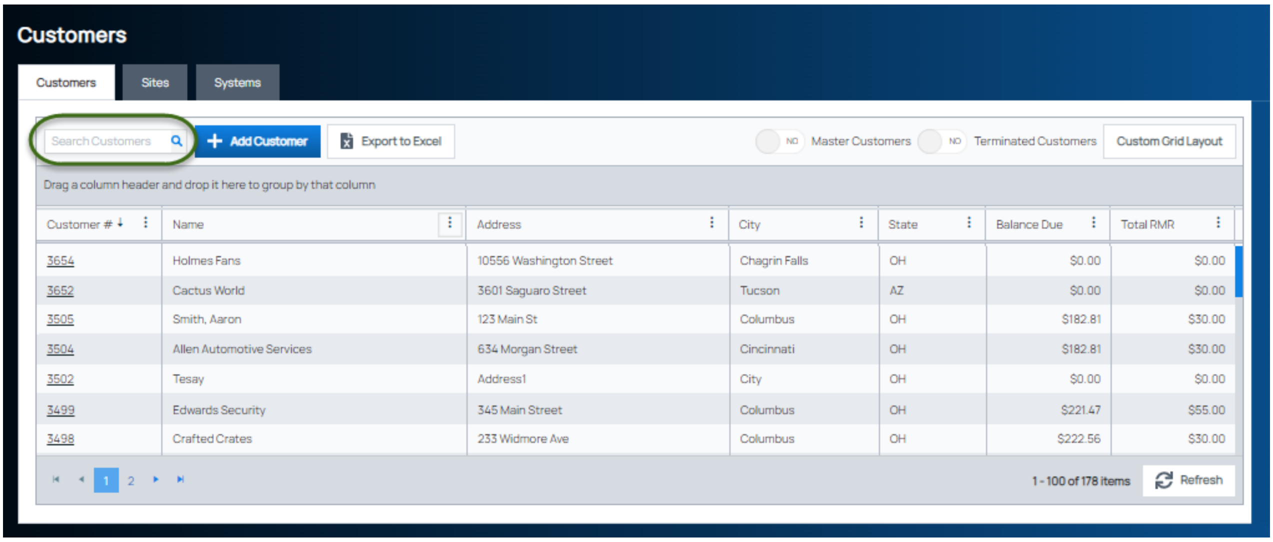
Add a Credit

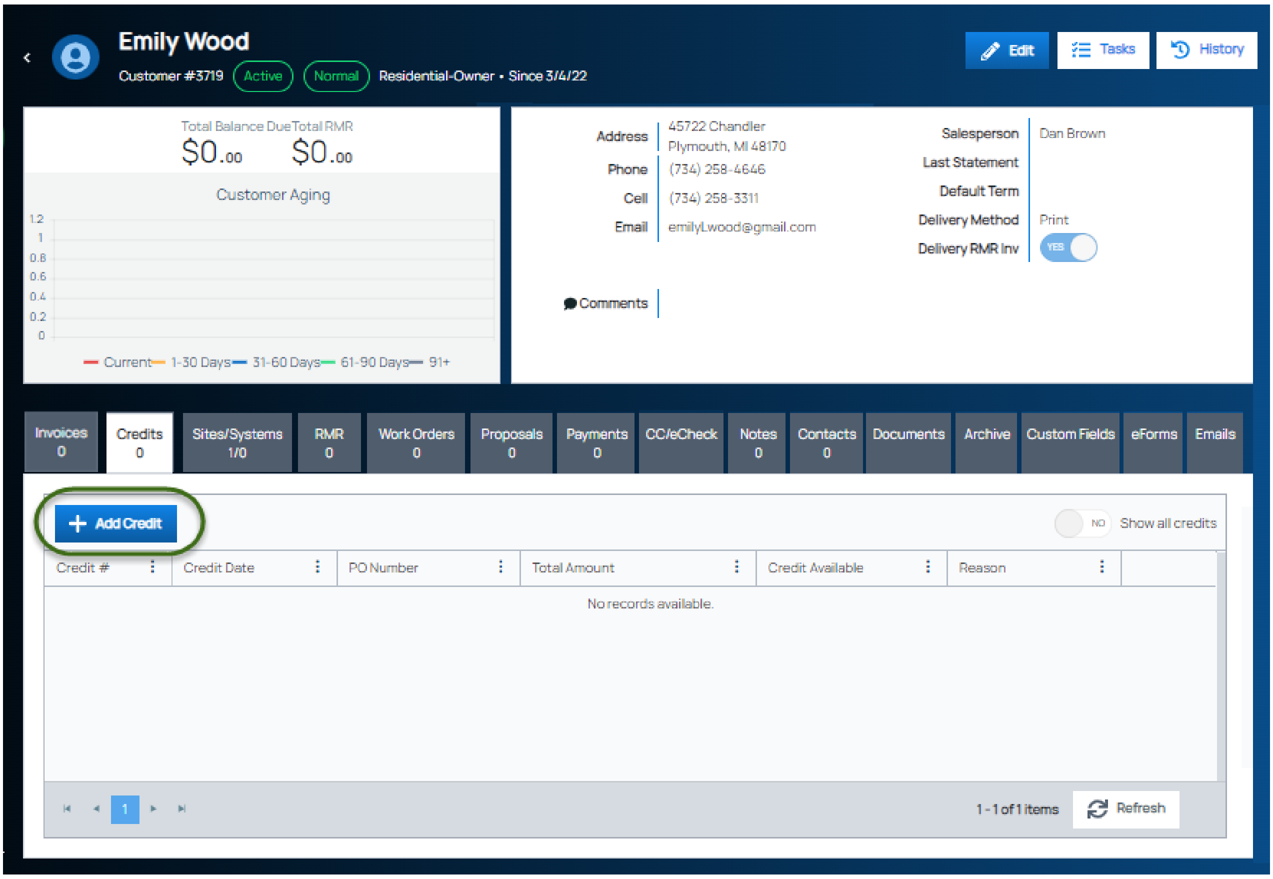
Last Modified on 12/16/2024 3:35 pm EST

From the main menu, arrive at the Customers list with this path: CRM > Customers.

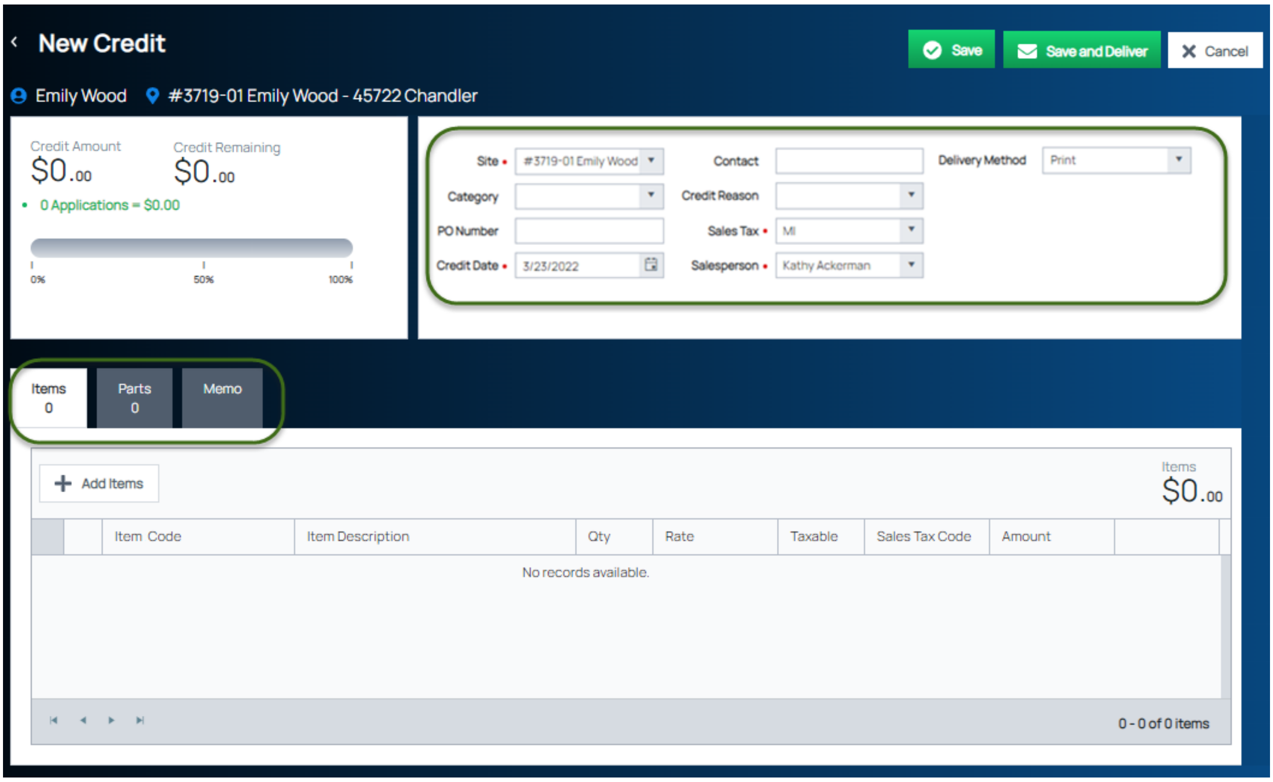
The Customers list opens. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



The Customer record opens. Click on the Credits tab, and then click on the Add Credit button.



The New Credit form opens.



There are three panels, which comprise the Credit form.

- The upper left panel displays the charges as items and/or parts including any applicable sales tax — this is for display for information purposes.
- The upper right panel displays what is referred to as the header of the credit. Most of the header information defaults from settings on the Customer record.
- The bottom panel is where you select Items and/or Parts that will be credited to the customer. There is also a Memo tab where you can enter up to 3,000 characters of text to print on the invoice.

Definitions of the data entry fields in the credit header are shown below. Data entry fields with a red bullet next to the field name are required.

Instructions on how to select Items and Parts and enter a Memo are also included in this section.

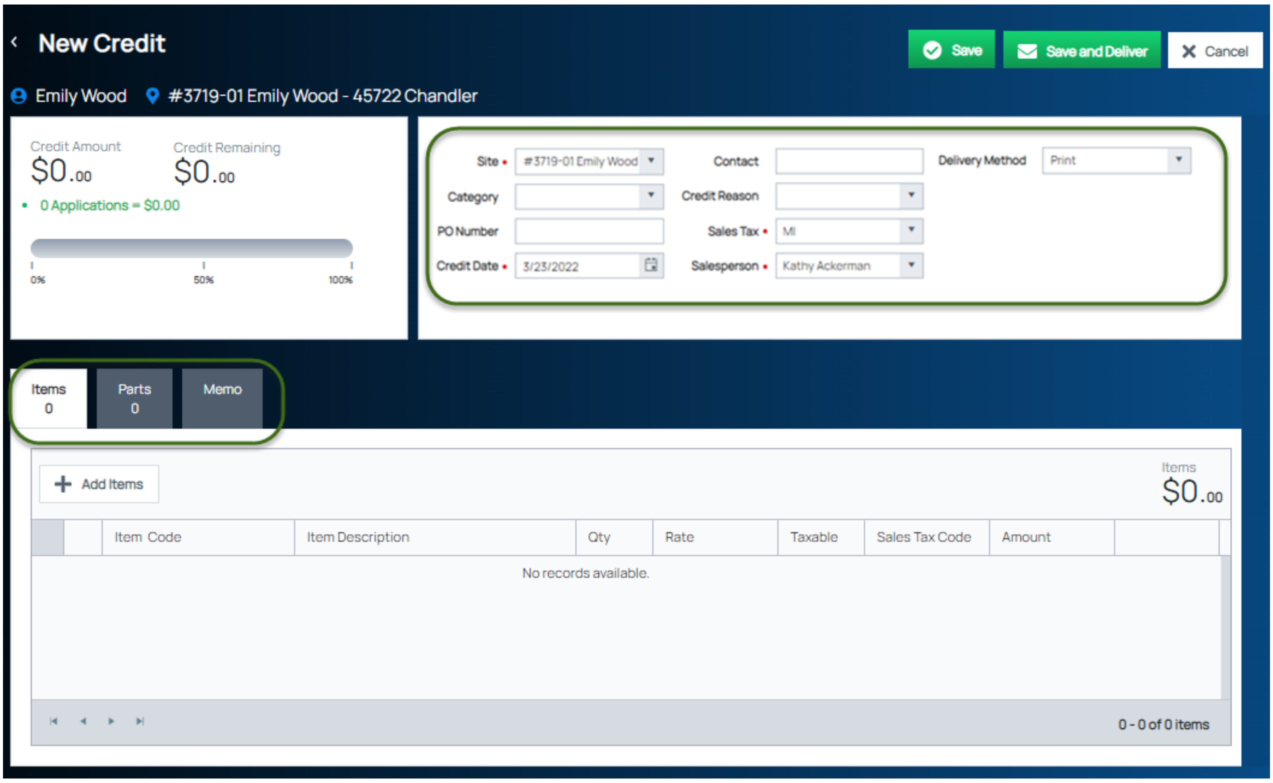
Credit Header Data Entry Fields

Data entry fields preceded by an asterisk are required.

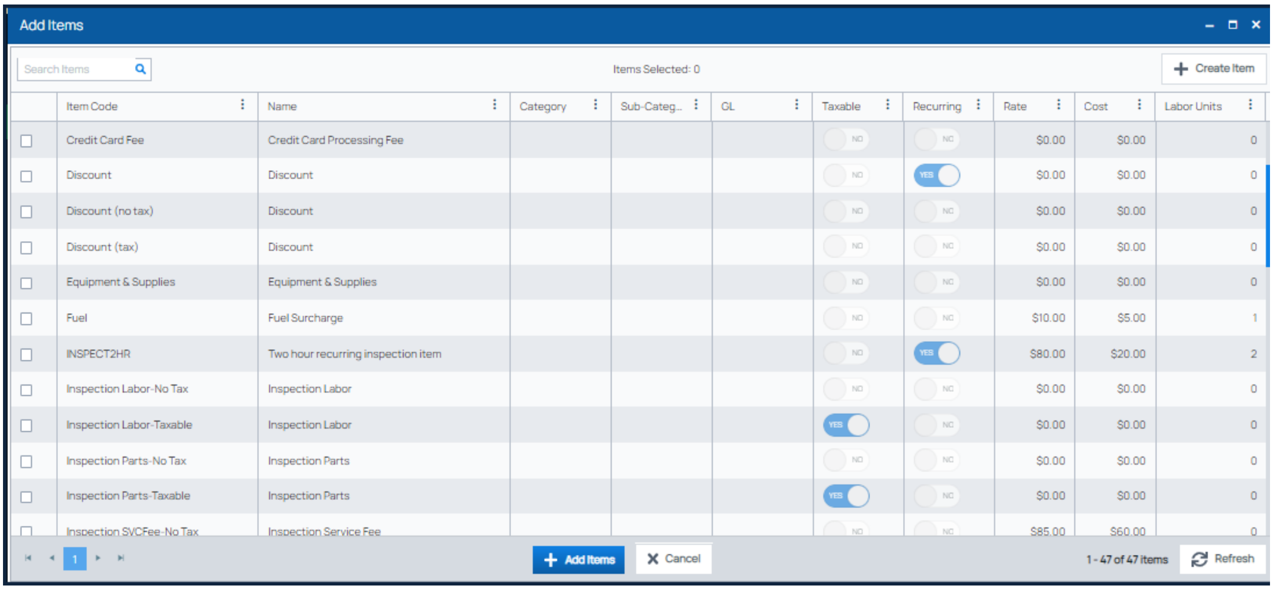
- *__Site__: This field defaults to the first site created for the customer. You can change this to a different site.
- **Category**: Make a selection from the drop-down list. This is the category for income and expenses on the credit.
- **PO Number**: This field is currently not used.
- *__Credit Date__: This defaults to today's date, however may be changed if necessary.
- **Contact**:
- **Credit Reason**: Make a selection from the drop-down list.
- *__Sales Tax__: This defaults to the Sales Tax code setup on the customer. This can be overridden if necessary.
- *__Salesperson__: This defaults to the Salesperson setup on the customer. This can be overridden if necessary.
- **Delivery Method**: This defaults to the Delivery Method setup on the customer. This may be overridden if necessary.

Add Items to the Credit

To select items to include on the credit, click the Items tab, and then click the Add Items button.

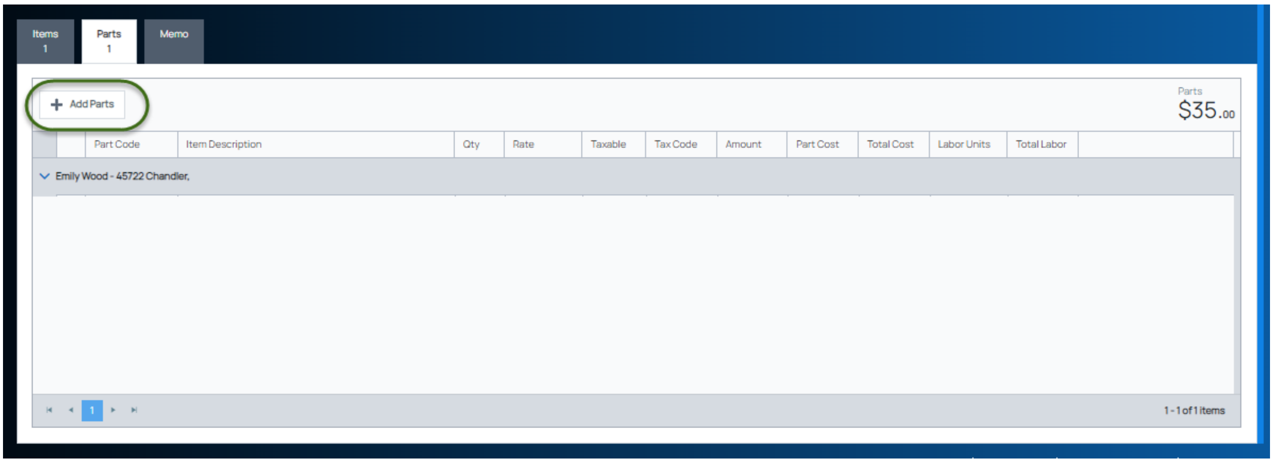


The Add Items List is displayed. For each item you want to include on the credit, select the checkbox to the left of the Item Code column. When finished, click the Add Items button at the bottom of the list.

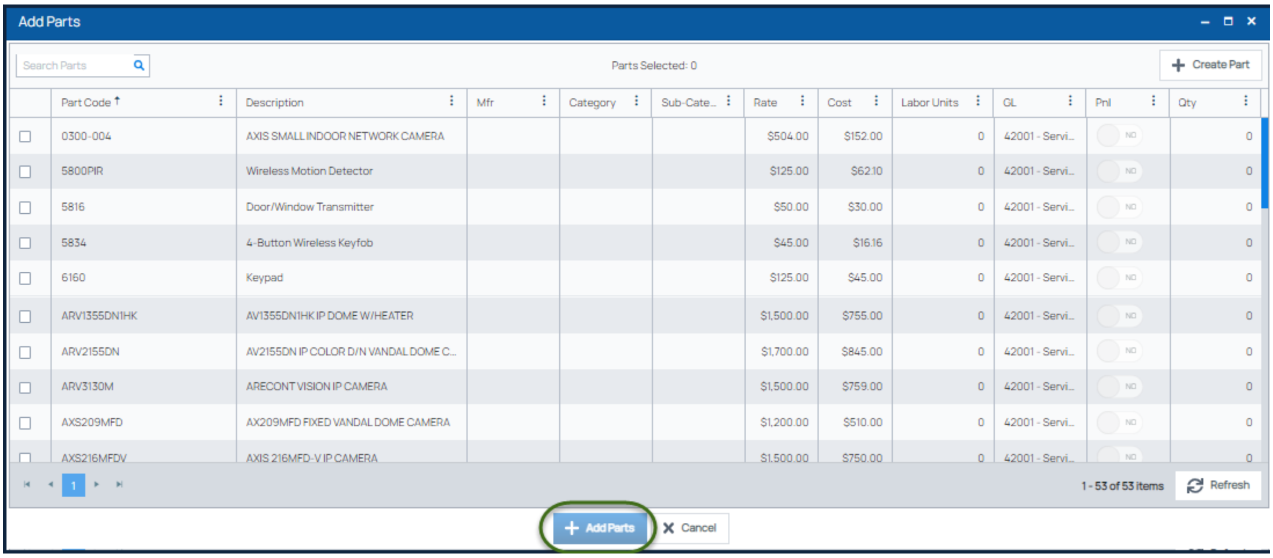


Add Parts to the Credit

To select parts to include on the credit, click the Parts tab, and then click the Add Parts button.



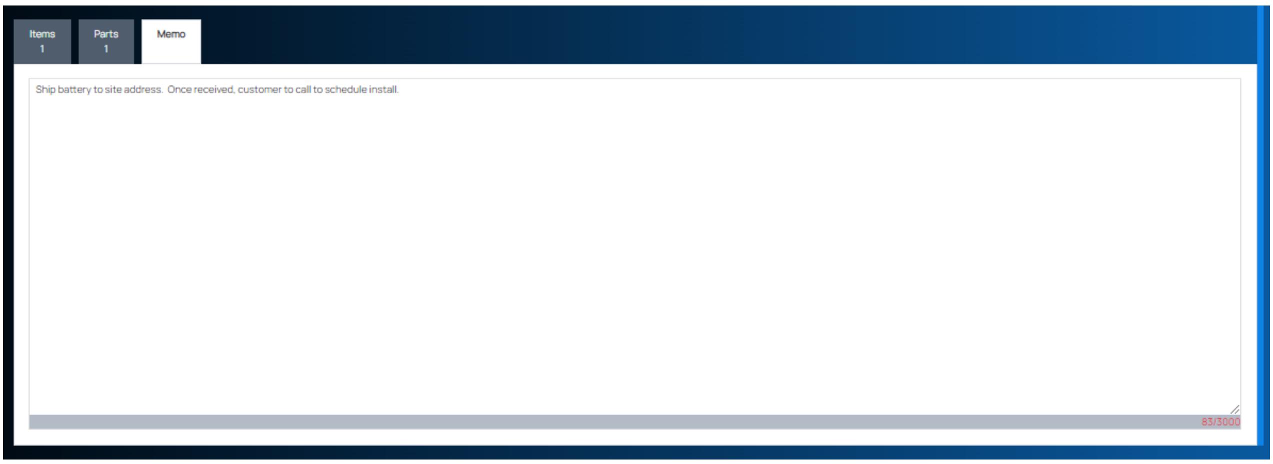
The Add Parts List is displayed. For each part you want to include on the credit, select the checkbox to the left of the Part Code column. When finished, click the Add Parts button at the bottom of the list.



Add a Memo to the Credit

To add a memo to the credit (that will be printed), click the Memo tab.

In the text box, type up to 3,000 characters of text.



Saving the Credit

When finished filling in the credit header and making selections for items and parts, you are ready to save the credit.

If the Delivery Method in the Credit Header is set to:

- **Print** — click the Save button.
- **Email or Mail** — click the Save and Deliver button.