

Add a Credit

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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 screenshot shows the 'Customers' list interface. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Customers' with a magnifying glass icon, a '+ Add Customer' button, and an 'Export to Excel' button. There are also radio buttons for 'Master Customers' and 'Terminated Customers', and a 'Custom Grid Layout' button. Below this is a table with columns: Customer #, Name, Address, City, State, Balance Due, and Total RMR. The table contains several rows of customer data. At the bottom, there is a pagination bar showing '1 - 100 of 178 items' and a 'Refresh' button.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

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

The screenshot shows the customer record for 'Emily Wood' (Customer #3719). The record is 'Active' and 'Normal', and is a 'Residential-Owner' since 3/4/22. The record shows 'Total Balance Due' and 'Total RMR' as \$0.00. There is a 'Customer Aging' chart. The record also shows contact information (Address, Phone, Cell, Email) and salesperson information (Salesperson, Last Statement, Default Term, Delivery Method, Delivery RMR Inv). Below this is a 'Comments' section. At the bottom, there is a navigation bar with tabs for 'Invoices', 'Credits', 'Sites/Systems', 'RMR', 'Work Orders', 'Proposals', 'Payments', 'CC/eCheck', 'Notes', 'Contacts', 'Documents', 'Archive', 'Custom Fields', 'eForms', and 'Emails'. The 'Credits' tab is selected, showing a '+ Add Credit' button circled in green. Below the button is a table with columns: Credit #, Credit Date, PO Number, Total Amount, Credit Available, and Reason. The table is currently empty, showing 'No records available.' At the bottom, there is a pagination bar showing '1 - 1 of 1 items' and a 'Refresh' button.

Credit #	Credit Date	PO Number	Total Amount	Credit Available	Reason
No records available.					

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 screenshot shows the 'New Credit' interface. At the top, there are buttons for 'Save', 'Save and Deliver', and 'Cancel'. Below that, the customer information is displayed: 'Emily Wood' and '#3719-01 Emily Wood - 45722 Chandler'. A summary box shows 'Credit Amount \$0.00' and 'Credit Remaining \$0.00', with a progress bar at 0% and '0 Applications = \$0.00'. A form area contains fields for Site, Contact, Delivery Method, Category, Credit Reason, PO Number, Sales Tax (MI), Credit Date (3/23/2022), and Salesperson (Kathy Ackerman). At the bottom, three tabs are visible: 'Items' (selected), 'Parts', and 'Memo'. The 'Items' tab shows a table with columns: Item Code, Item Description, Qty, Rate, Taxable, Sales Tax Code, Amount, and a total of 'Items \$0.00'. The table is currently empty with the message 'No records available.' and a footer indicating '0 - 0 of 0 items'.

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.

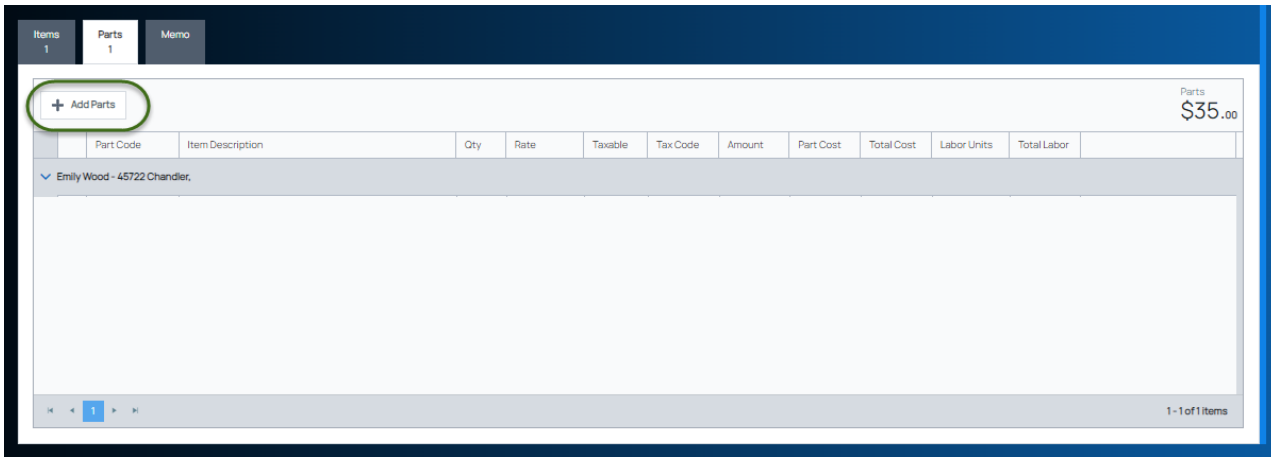
The screenshot shows the 'Add Items' list. At the top, there is a search bar and 'Items Selected: 0'. A '+ Create Item' button is in the top right. The table has columns: Item Code, Name, Category, Sub-Categ..., GL, Taxable, Recurring, Rate, Cost, Labor Units. The items listed are:

Item Code	Name	Category	Sub-Categ...	GL	Taxable	Recurring	Rate	Cost	Labor Units
<input type="checkbox"/>	Credit Card Fee	Credit Card Processing Fee			<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00	0
<input type="checkbox"/>	Discount	Discount			<input type="radio"/> NO	<input checked="" type="radio"/> YES	\$0.00	\$0.00	0
<input type="checkbox"/>	Discount (no tax)	Discount			<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00	0
<input type="checkbox"/>	Discount (tax)	Discount			<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00	0
<input type="checkbox"/>	Equipment & Supplies	Equipment & Supplies			<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00	0
<input type="checkbox"/>	Fuel	Fuel Surcharge			<input type="radio"/> NO	<input type="radio"/> NO	\$10.00	\$5.00	1
<input type="checkbox"/>	INSPECT2HR	Two hour recurring inspection item			<input type="radio"/> NO	<input checked="" type="radio"/> YES	\$80.00	\$20.00	2
<input type="checkbox"/>	Inspection Labor-No Tax	Inspection Labor			<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00	0
<input type="checkbox"/>	Inspection Labor-Taxable	Inspection Labor			<input checked="" type="radio"/> YES	<input type="radio"/> NO	\$0.00	\$0.00	0
<input type="checkbox"/>	Inspection Parts-No Tax	Inspection Parts			<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00	0
<input type="checkbox"/>	Inspection Parts-Taxable	Inspection Parts			<input checked="" type="radio"/> YES	<input type="radio"/> NO	\$0.00	\$0.00	0
<input type="checkbox"/>	Inspection SVC Fee-No Tax	Inspection Service Fee			<input type="radio"/> NO	<input type="radio"/> NO	\$85.00	\$60.00	0

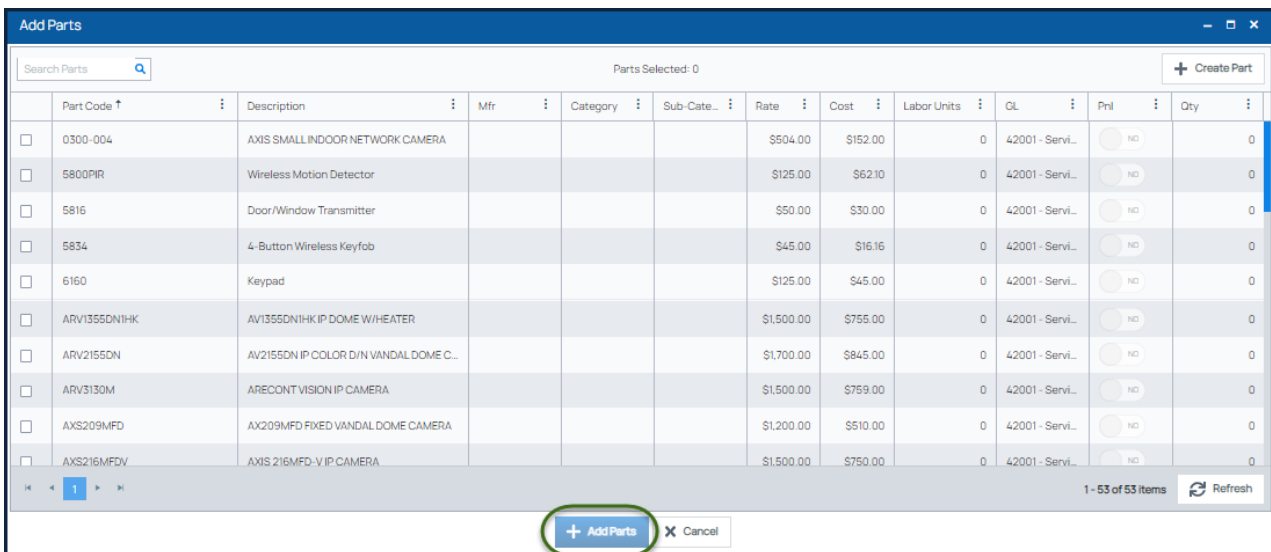
At the bottom, there are navigation arrows, an '+ Add Items' button, a 'Cancel' button, and a footer showing '1 - 47 of 47 items' and a 'Refresh' button.

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.
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