

Edit a Credit

Last Modified on 04/29/2022 10:32 am EDT

A Credit may be edited if the following conditions are true:

- The credit has not been applied to any invoices.
- The credit has not been mailed or emailed to the customer.
- The user has permissions for editing credits.

To edit a Credit, you must first access the customer record.

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

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

Customers

Customers Sites Systems

Search Customers + Add Customer Export to Excel

NO Master Customers NO Terminated Customers Custom Grid Layout

Drag a column header and drop it here to group by that column

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

1 2

1 - 100 of 178 items Refresh

The Customer record will be displayed. Click on the Credits tab. A list of all credits for the customer will be shown in the grid area. In the Credit # column, click on the hyperlink of the credit you want to edit.

Emily Wood
Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Total Balance Due Total RMR
\$0.00 **\$0.00**

Customer Aging

Address 45722 Chandler Plymouth, MI 48170
Phone (734) 258-4646
Cell (734) 258-3311
Email emilyLwood@gmail.com

Salesperson Dan Brown
Last Statement
Default Term
Delivery Method Print
Delivery RMR Inv YES

Invoices 0 **Credits 0** Sites/Systems 1/0 RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 0 Documents Archive Custom Fields eForms Emails

+ Add Credit NO Show all credits

Credit #	Credit Date	PO Number	Total Amount	Credit Available	Reason	
21450	Mar 22, 2022		(\$47.70)	(\$47.70)	Service-Issues	<input checked="" type="checkbox"/> Apply
21449	Mar 22, 2022		(\$25.00)	(\$25.00)	Referral	<input checked="" type="checkbox"/> Apply

1 - 1 of 1 items Refresh

The Credit record will be displayed. Click on the Edit button at the upper right of the page.

Credit 21449 Apply Credit Deliver **Edit** Tasks History More...

Emily Wood #3719-01 Emily Wood - 45722 Chandler

Credit Amount **\$25.00** Credit Remaining **\$25.00**
0 Applications = \$0.00

Category 100 G&A
PO Number -
Credit Date March 22, 2022
Contact -
Credit Reason Referral
Sales Tax MI - 6.0000%

Salesperson Kathy Ackerman
Delivery Method Print
Originally Delivered -
Locked NO

Items 1 Parts 0 Memo Applications 0 Tax Emails General Ledger

Export to Excel Items \$25.00

Item Part Code	Item Description	Qty	Rate	Taxable	Sales Tax Code	Amount
Referral	Customer Referral Credit	1	\$25.00	NO	MI	\$25.00

1 - 1 of 1 items Refresh

The Credit will be displayed in edit mode. Make the necessary changes, and when finished, click on the Save button at the upper right of the page.

< Credit 21449

Save Cancel

Emily Wood #3719-01 Emily Wood - 45722 Chandler

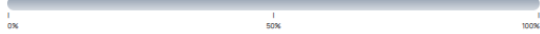
Credit Amount

\$25.00

0 Applications = \$0.00

Credit Remaining

\$25.00



Site #3719-01 Emily Wood

Category 100 GSA

PO Number

Credit Date 3/22/2022

Contact

Credit Reason Referral

Sales Tax MI

Salesperson Kathy Ackerman

Delivery Method Print

Items 1 Parts 0 Memo

+ Add Items

Items \$25.00

Item Part Code	Item Description	Qty	Rate	Taxable	Sales Tax Code	Amount	
Emily Wood - 45722 Chandler, MI							
Referral	Customer Referral Credit	1	\$25.00	<input type="radio"/>	MI	\$25.00	

1 - 1 of 1 Items