

# Edit a Credit

Last Modified on 12/16/2024 3:40 pm EST

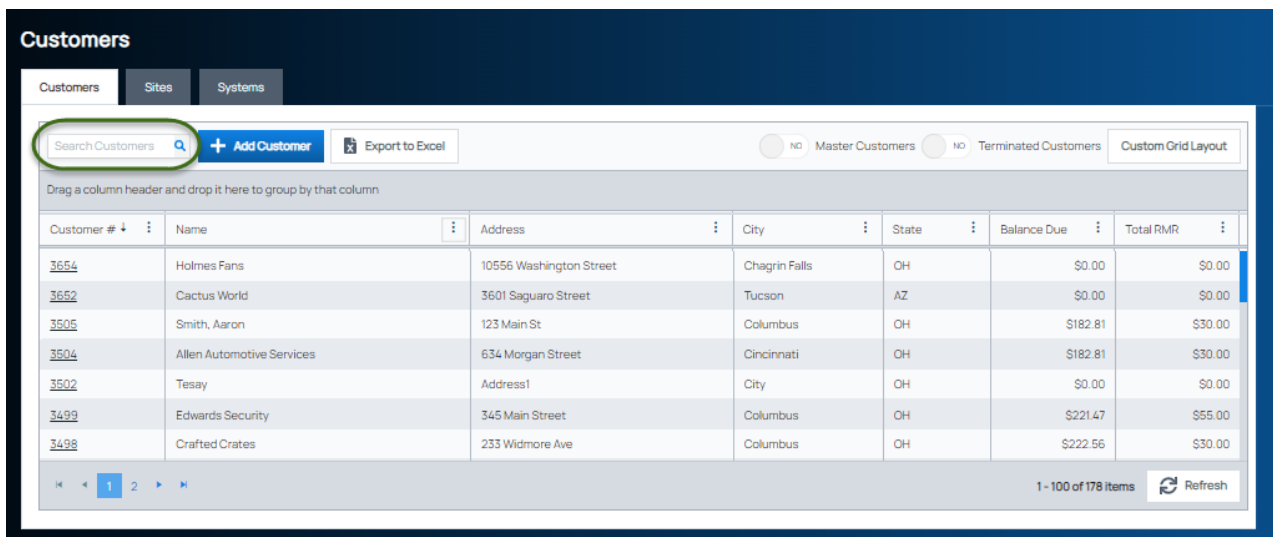
A Credit may be edited if the following conditions are true:

- 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: CRM > Customers.

The Customers opens. 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

Master Customers  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
<a href="#">3654</a>	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3652</a>	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
<a href="#">3505</a>	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
<a href="#">3504</a>	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
<a href="#">3502</a>	Tesay	Address1	City	OH	\$0.00	\$0.00
<a href="#">3499</a>	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
<a href="#">3498</a>	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

1 - 100 of 178 items Refresh

The Customer record opens. Click on the Credits tab. A list of all credits for the customer are 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

Comments

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	
<u>21450</u>	Mar 22, 2022		(\$47.70)	(\$47.70)	Service-Issues	<input checked="" type="checkbox"/> Apply
<u>21449</u>	Mar 22, 2022		(\$25.00)	(\$25.00)	Referral	<input checked="" type="checkbox"/> Apply

1 - 1 of 1 Items Refresh

The Credit record opens. Click 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 Salesperson Kathy Ackerman  
PO Number - Delivery Method Print  
Credit Date March 22, 2022 Originally Delivered -  
Contact - Locked  NO ?  
Credit Reason Referral  
Sales Tax MI - 6.0000%

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
Emily Wood - 45722 Chandler, MI						
Referral	Customer Referral Credit	1	\$25.00	<input type="checkbox"/> NO	MI	\$25.00

1 - 1 of 1 Items Refresh

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

< Credit 21449

Save Cancel

Emily Wood #3719-01 Emily Wood - 45722 Chandler

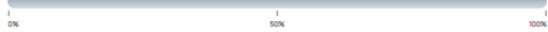
Credit Amount

\$25.00

0 Applications = \$0.00

Credit Remaining

\$25.00



Site: #3719-01 Emily Wood  
Category: 100 G&A  
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"/> NO	MI	\$25.00	<input type="button" value="Delete"/> <input type="button" value="Print"/> <input type="button" value="Site"/>

1 - 1 of 1 Items