Edit a Credit

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

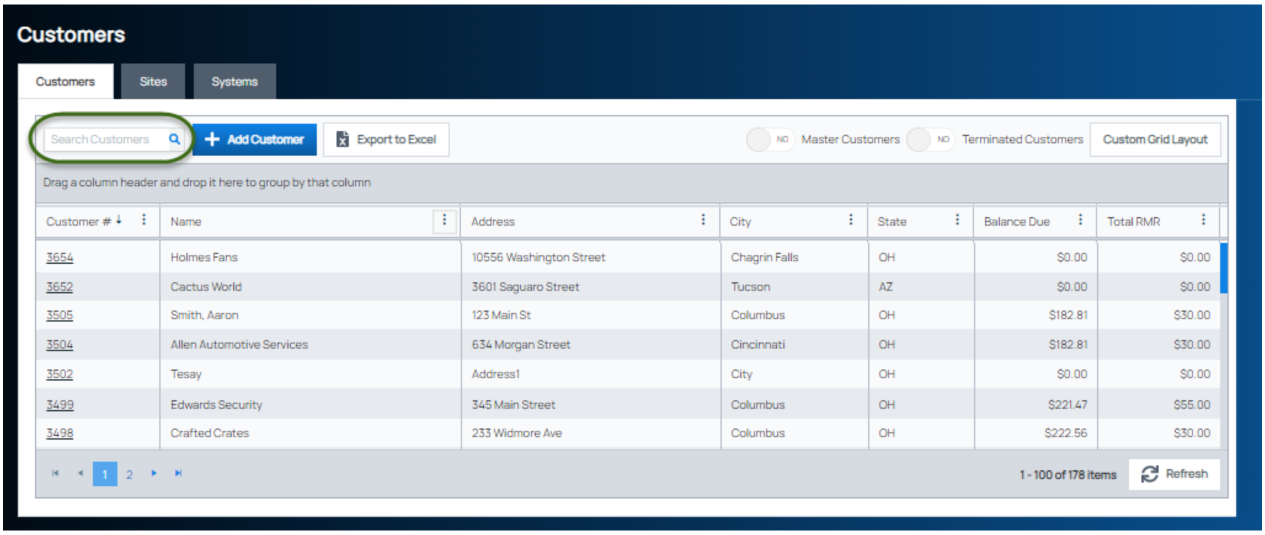
A Credit may be edited if the following conditions are true:

- 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.

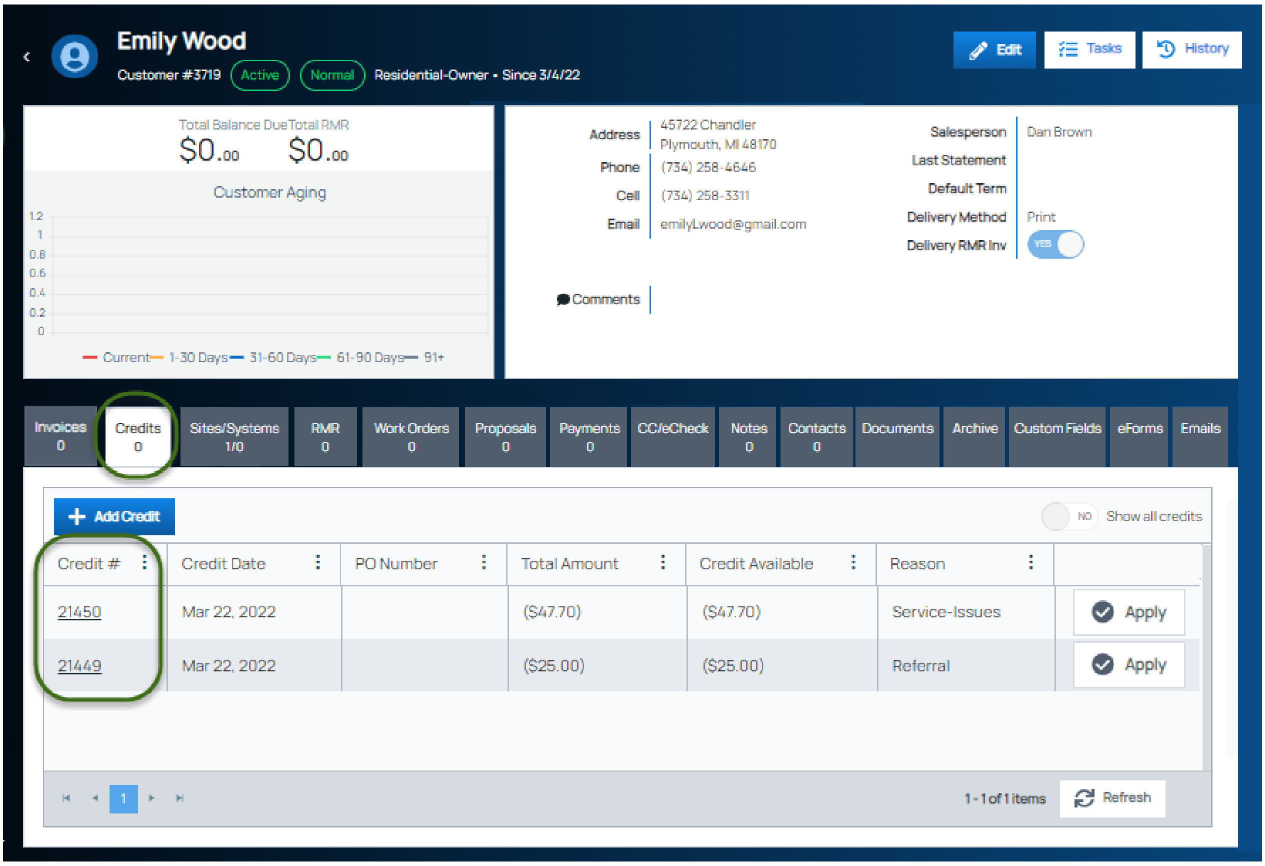
To edit a Credit, you must first access the customer record.

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

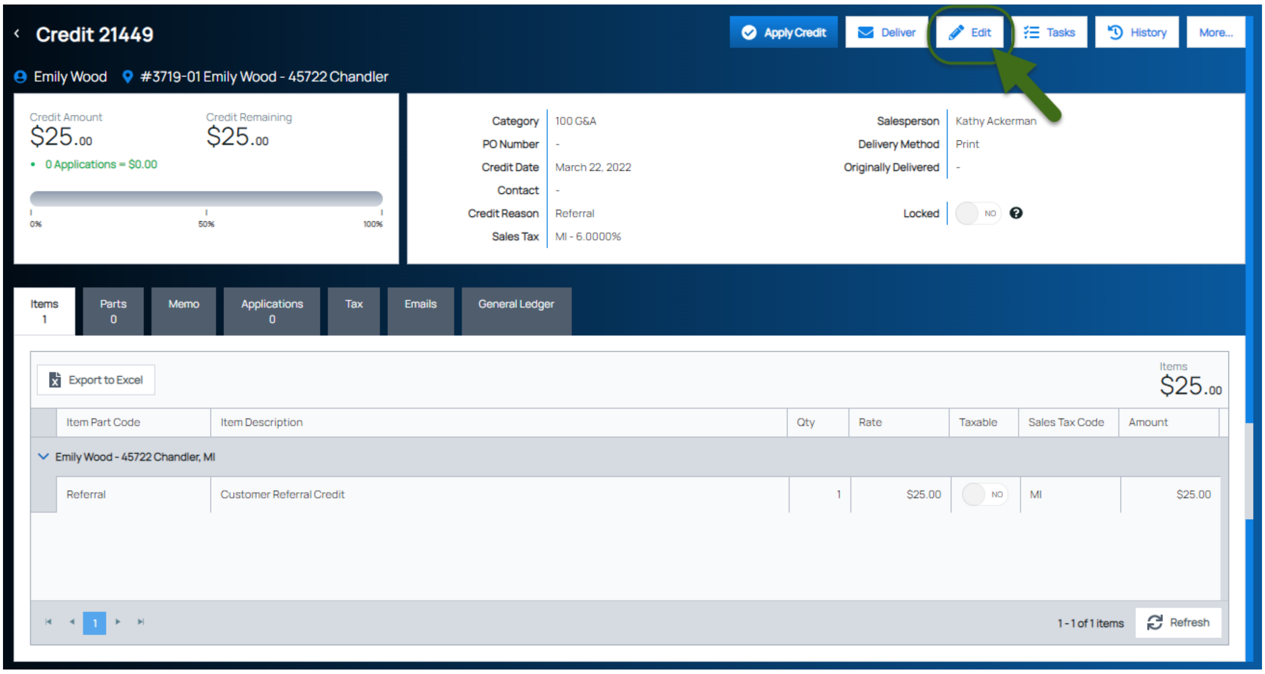
The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



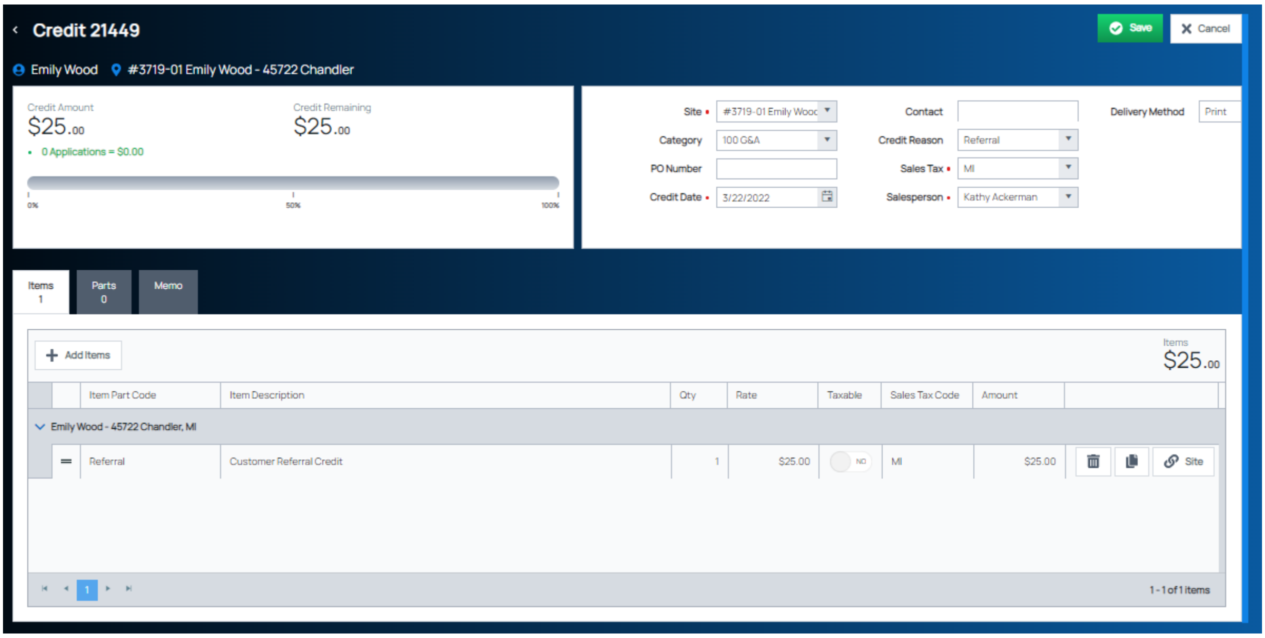
The Customer record will be displayed. Click on the Credits tab. A list of all credits for the customer will be shown in the grid area. In the Credit # column, click on the hyperlink of the credit you want to edit.



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



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
0%
50%
100%
Site
#3719-01 Emily Wooc
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
NO
MI
$25.00
Site
1
1 - 1 of 1 items