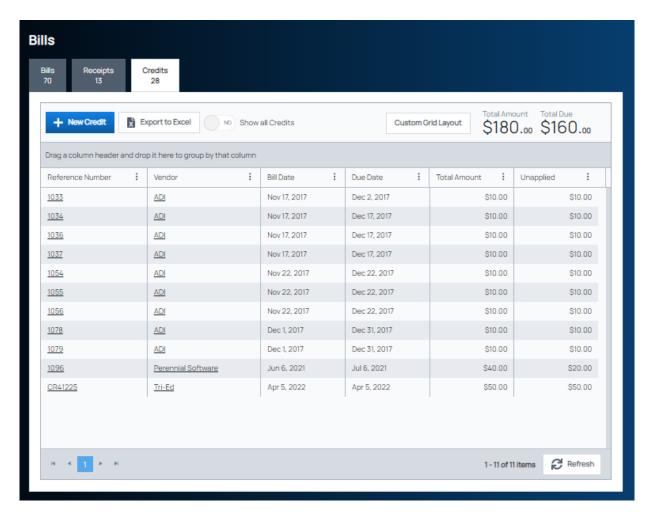
Add a Credit

Last Modified on 10/07/2025 4:37 pm EDT

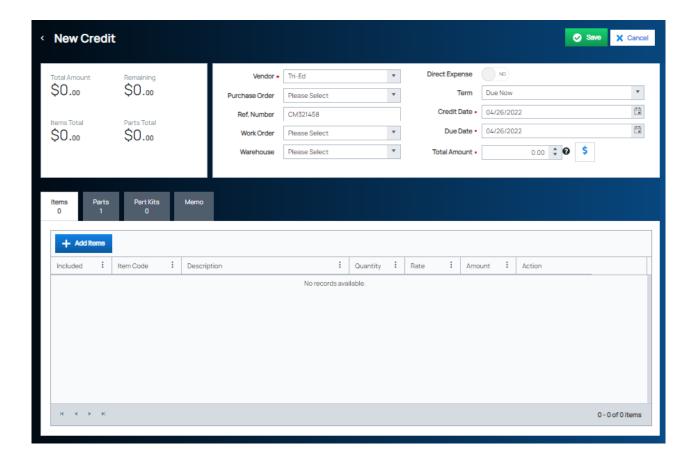
Credits can be created for items, parts or part kits. A credit can be created from a vendor record, by clicking on the Credits tab and then clicking the New Credit button. Credits can also be created from the Credits tab of the Bill List. If you are entering several credits for multiple vendors, entering the credits from the Bills list is faster than opening each vendor record and entering the credits.

Navigate to Accounts Payable > Bills. The Bills page opens. Click on the Credits tab, and then click the New Credit button.



The New Credit page opens. This page has two panels at the top and four tabs in the lower area.

- **Upper Left Panel** As items, parts, or part kits are added to the credit, these amounts are automatically updated.
- Upper Right Panel This panel is considered the header of the credit. Each data entry field is described below.
- Tabs Panel You can add any combination of items, parts or part kits to the credit. The memo field is for internal company information only.



Data Entry Fields

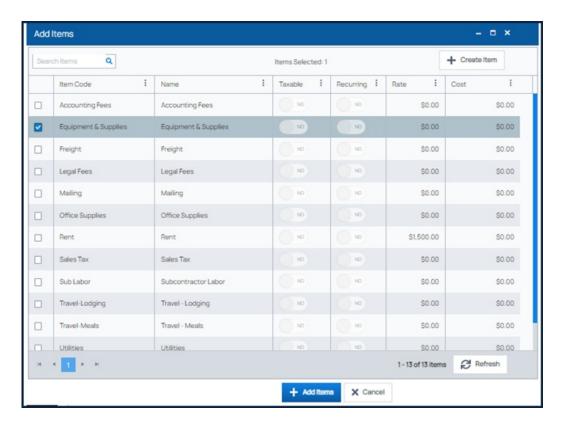
Credit Header Information

- **Vendor** Select the Vendor from the drop-down list.
- Purchase Order If the credit is associated with a purchase order, make a selection from the drop-down list.
- **Ref. Number** This field is for the vendor's credit memo number.
- Work Order If the credit is associated with a work order, make a selection from the drop-down list.
- Warehouse This field is not used at this time.
- Direct Expense If the items on the credit are being direct expensed, set the toggle button to Yes.
- **Term** Select the payment terms for the credit, typically Due Now.
- **Credit Date** This field defaults to today's date enter the actual date from the vendor's credit memo.
- **Due Date** The due date is automatically be calculated based upon the Term selected and the Credit Date entered. This date can be overridden if necessary.
- **Total Amount** Once all items, parts, and part kits have been entered, enter the total amount of the credit with is displayed in the upper left panel of the credit page.

Once the header information has been entered, you can add items, parts, and part kits.

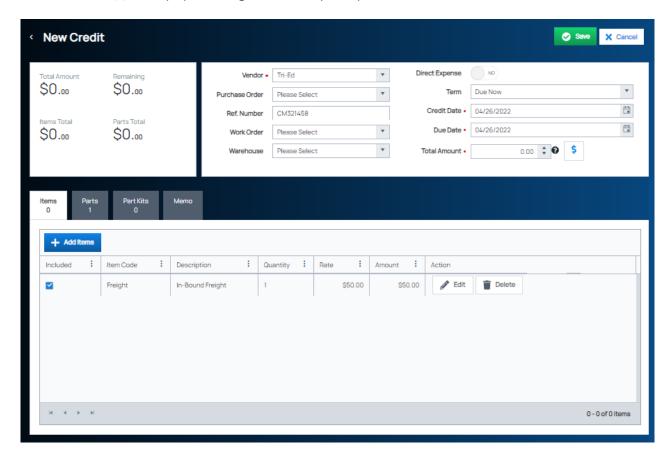
Add Items to the Credit

Click on the Items tab, and then click the Add Items button.

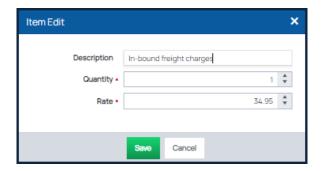


The Add Items page opens. Select the checkbox to the left of each item to add to the credit. When finished, click the Add Items button at the bottom of the page.

The selected item(s) are displayed in the grid area. The quantity defaults to 1, and the rate defaults to zero.

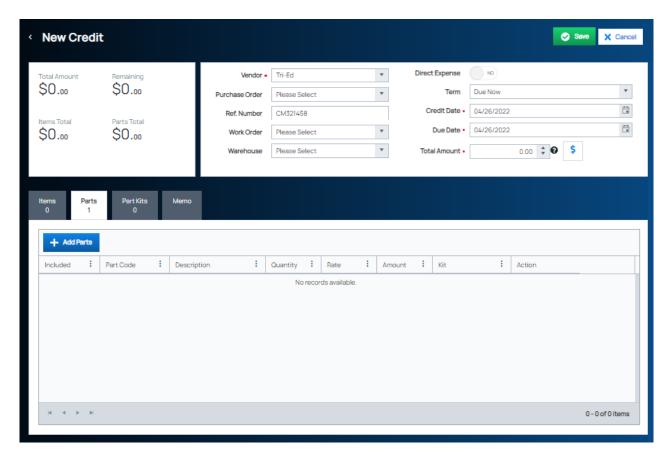


Click the Edit button to open the Item Edit form. Fill in the three fields on this form, and then click the Save button when finished. The description field is optional.

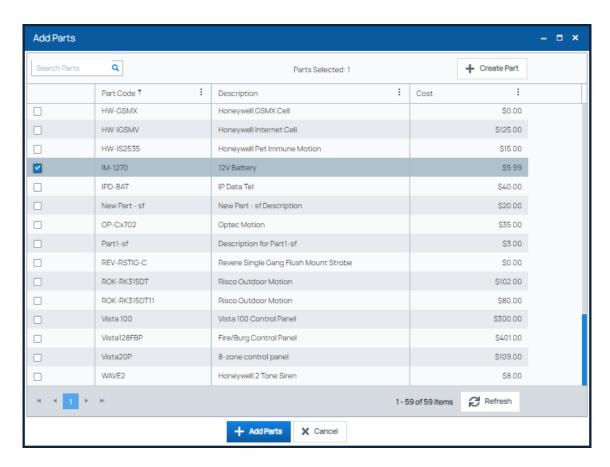


Add Parts to the Credit

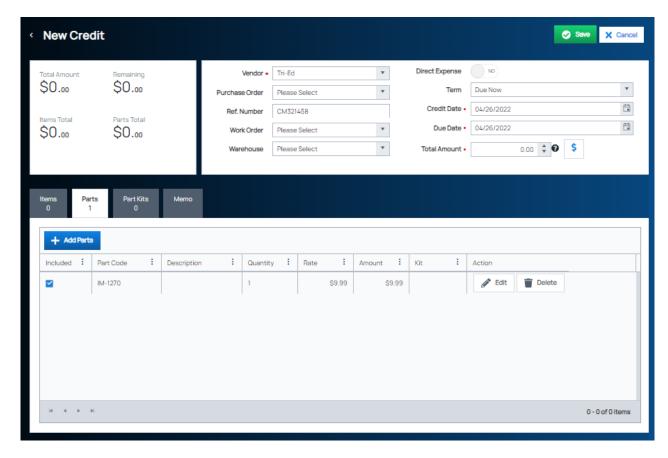
Click on the Parts tab, and then click the Add Parts button.



The Add Parts page opens. Select the checkbox to the left of each part to add to the credit. When finished, click the Add Parts button at the bottom of the page.



The selected part(s) are displayed in the grid area. The quantity defaults to 1, and the rate auto-fills with the amount from the part setup.

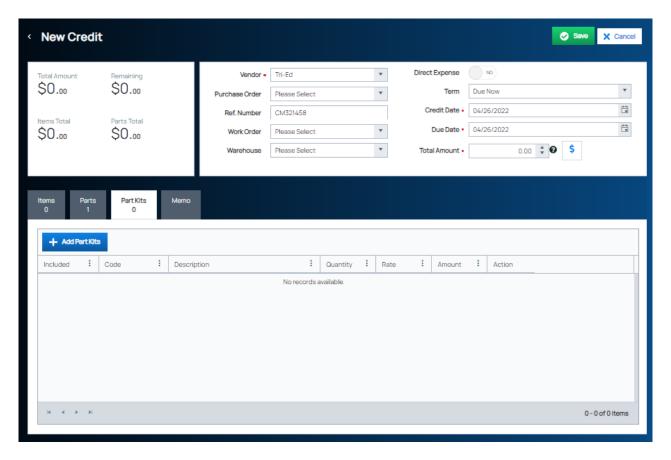


If the quantity or the rate are incorrect, click the Edit button to open the Part Edit form. Fill in the three fields on this form, and then click the Save button when finished. The Description field is optional.

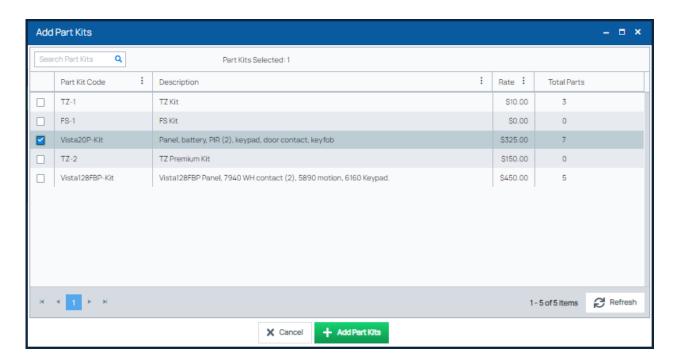


Add a Part Kit to the Credit

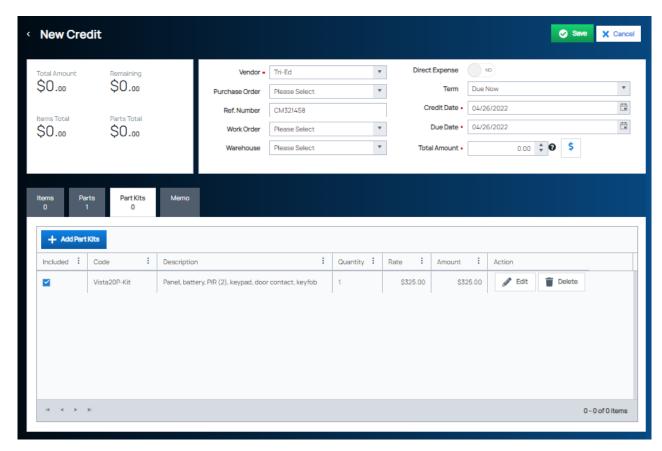
Click on the Part Kits tab, and then click the Add Part Kits button.



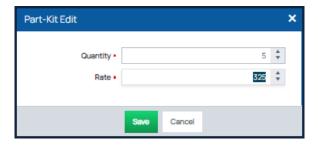
The Add Part Kits page opens. Select the checkbox to the left of each part kit to add to the credit. When finished, click the Add Part Kits button at the bottom of the page.



The selected part kit(s) are displayed in the grid area. The quantity defaults to 1, and the rate defaults to the rate setup on the Part Kit setup.

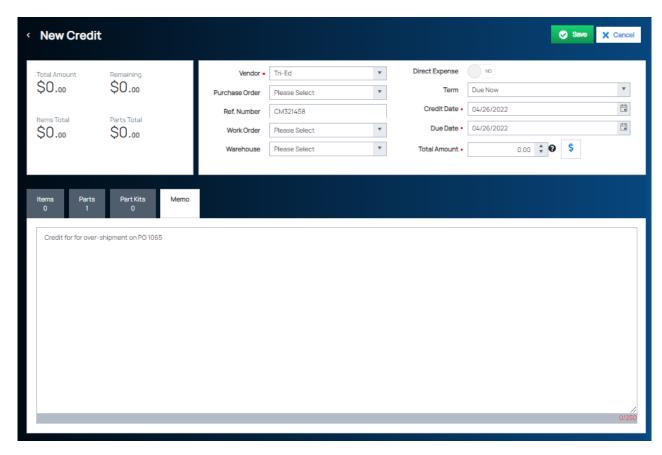


To edit the quantity or rate, click the Edit button. The Part Kit Edit form opens. Fill in the two fields on this form, and then click the Save button when finished.



Add a Memo to the Credit

Clicking the Memo tab opens a large text field to enter information pertinent to the credit. The text entered is for internal company use. A maximum of 250 characters is allowed.



When finished adding items, parts, and part kits to the credit, enter the total amount of the credit in the header area. In the upper left panel, the total credit amount is displayed. Click the Save button at the upper right of the page when finished.

