

Credit Reasons Report

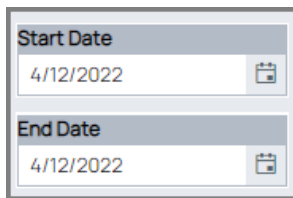
Last Modified on 04/20/2022 4:49 pm EDT

The Credit Reasons report is designed to review customer credits created by users for auditing purposes. This report is grouped by the Credit Reason code. When creating a customer credit, the user must select a Credit Reason code. The Credit Reasons are stored and maintained in Setup > Other > Credit Reasons.

Report Parameters

The parameters available for this report are:

- Start and End Date

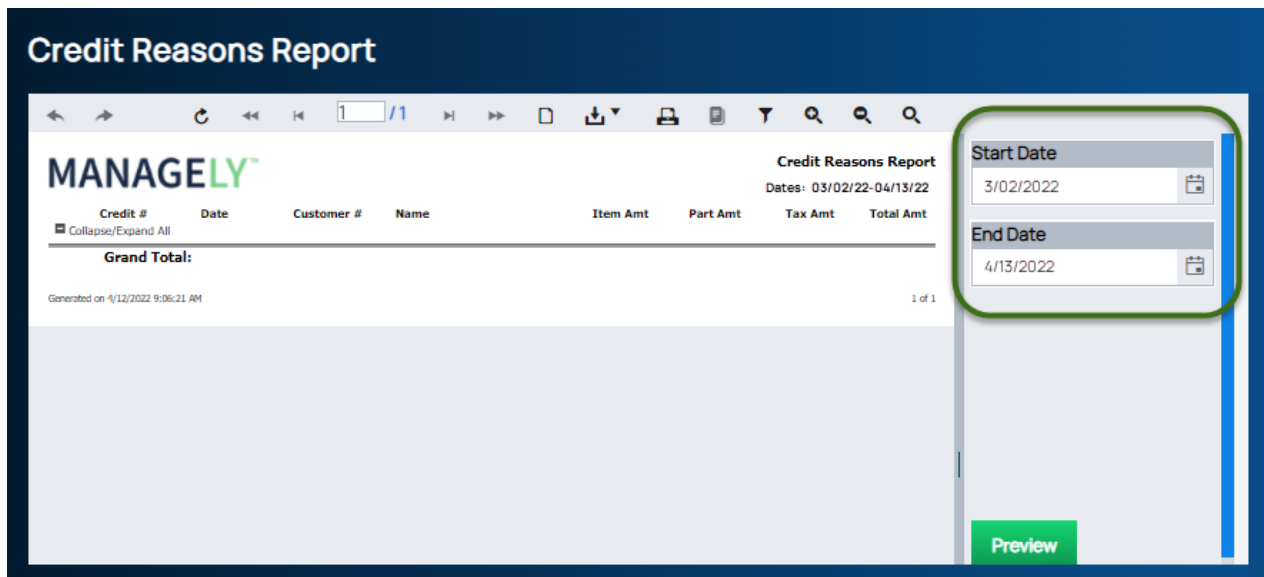


A screenshot of a form with two date selection fields. The first field is labeled 'Start Date' and contains the date '4/12/2022'. The second field is labeled 'End Date' and also contains the date '4/12/2022'. Each field has a small calendar icon to its right.

Generate the Credit Reasons Report

To generate this report, navigate to Reports > Accounts Receivable > Credit Reasons Report.

The Credit Reasons Report page is displayed. In the Parameters area, select the date range for the report. The date used on this report reflects the date entered [by the user] for the Customer Credit. When finished, click the Preview button.



A screenshot of the 'Credit Reasons Report' interface in the ManageLy system. The interface has a dark blue header with the title 'Credit Reasons Report'. Below the header is a navigation bar with various icons. The main content area is white and features the 'MANAGELY™' logo on the left. On the right side of the main content area, there is a 'Parameters' section with two date selection fields: 'Start Date' (set to 3/02/2022) and 'End Date' (set to 4/13/2022). Below these fields is a 'Preview' button. The main content area also displays a table with columns for 'Credit #', 'Date', 'Customer #', 'Name', 'Item Amt', 'Part Amt', 'Tax Amt', and 'Total Amt'. A 'Grand Total:' row is visible below the table. The interface also shows a 'Generated on' timestamp and a page number '1 of 1'.

The report results depend on the selections in the parameters area. Use the function buttons to print or export the report.

Credit Reasons Report

Navigation icons: back, forward, refresh, search, print, etc.



Credit Reasons Report
 Dates: 03/02/22-04/13/22

Credit #	Date	Customer #	Name	Item Amt	Part Amt	Tax Amt	Total Amt
<input type="checkbox"/> Collapse/Expand All							
Referral							
21449	03/22/22	3719	Wood, Emily	-25.00	0.00	0.00	-25.00
21465	03/25/22	3719	Wood, Emily	-50.00	0.00	0.00	-50.00
205	03/28/22	3720	Watson, George	-25.00	0.00	0.00	-25.00
Referral Subtotal:				-100.00	0.00	0.00	-100.00
Service-Issues							
21450	03/22/22	3719	Wood, Emily	0.00	-45.00	-2.70	-47.70
Service-Issues Subtotal:				0.00	-45.00	-2.70	-47.70
Goodwill							
21466	03/25/22	3719	Wood, Emily	-60.00	0.00	-3.60	-63.60
Goodwill Subtotal:				-60.00	0.00	-3.60	-63.60
Grand Total:				-160.00	-45.00	-6.30	-211.30