Credit Reasons Report

Last Modified on 11/01/2024 4:53 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.
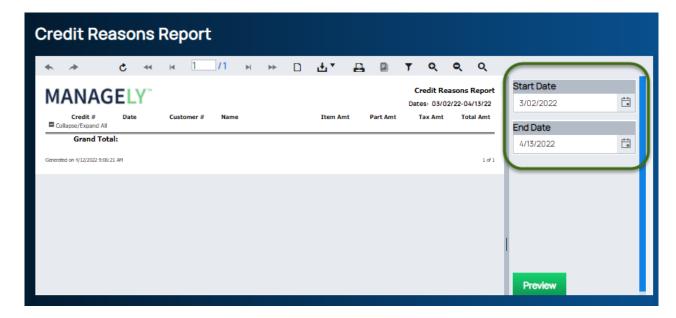
Report Parameters

The parameters available for this report are:

- Start and End Date
- Order By
- Sort Descending
- Branch

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.

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

Credit Reasons Report

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	Credit #	Date	Customer #	Name	Item Amt	Part Amt	Tax Amt	Total Amt
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**