
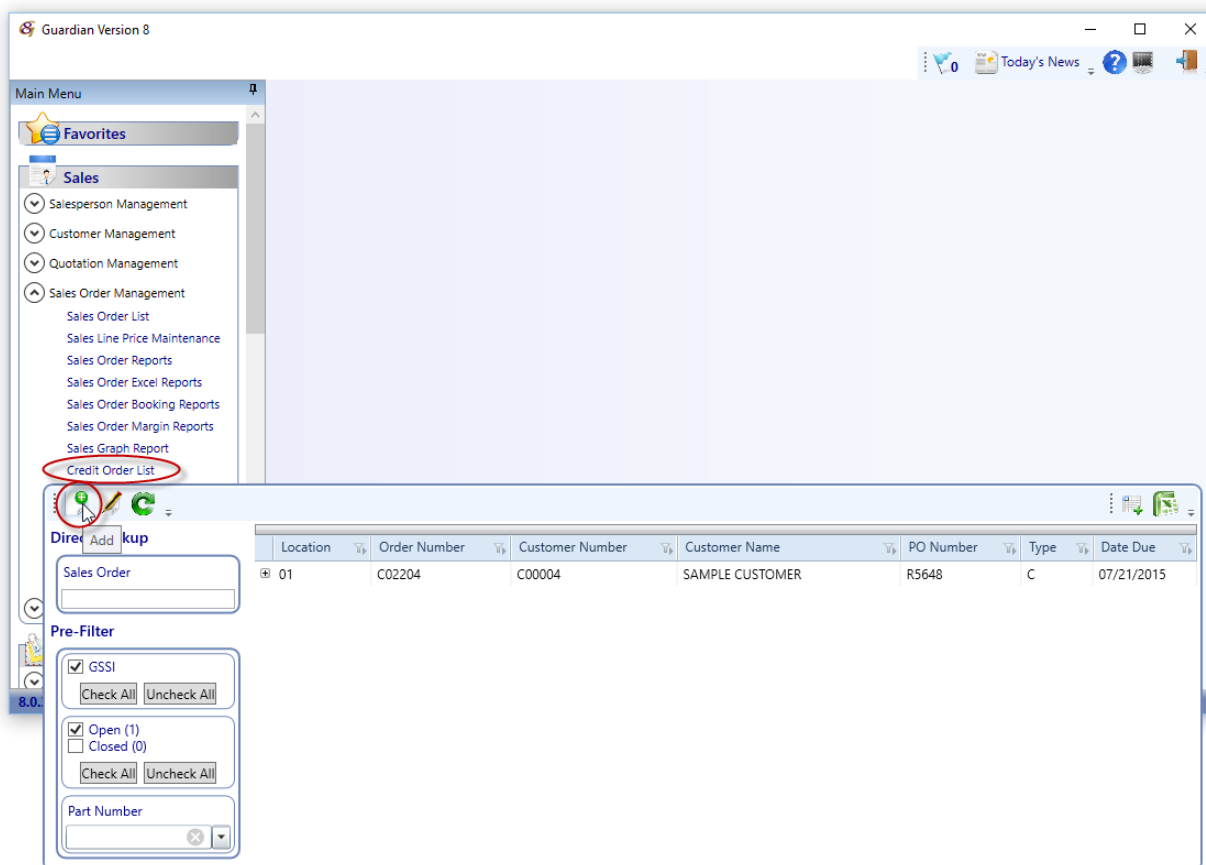




## KnowledgeBase Article 2001

### Credit Order

This Article documents the steps to create a Credit Order.

1. Navigate to Sales > Sales Order Management > Credit Order List
2. Click the Add button 

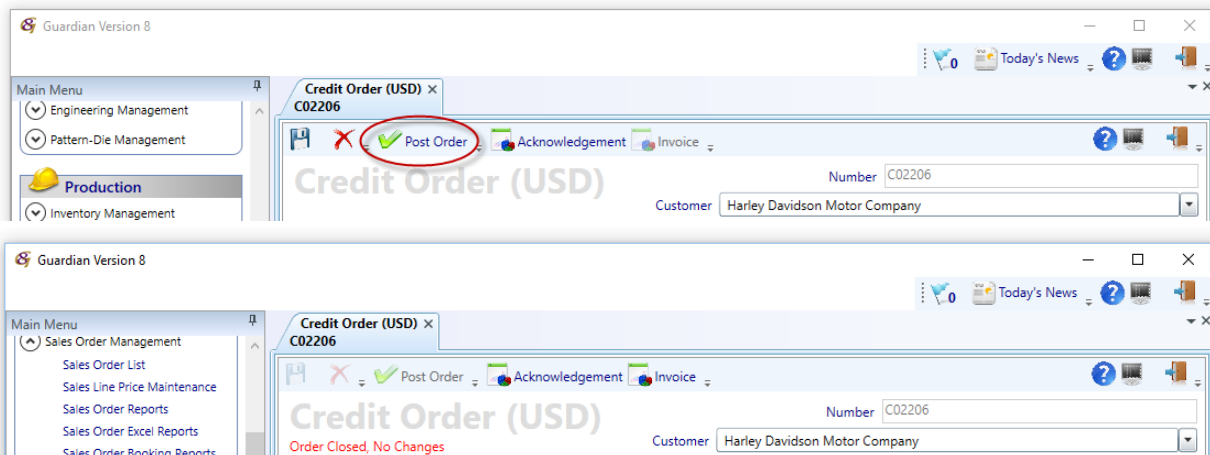


3. Select or Enter the Customer...this will populate Customer-related required fields
4. Complete the remaining required fields
  - a. Type: Same Type as is used on the Sales Order
  - b. Debit Memo Ref: Typically, your Return Authorization Number or other reference for Credit
  - c. Invoice Number: Invoice the credit is against
  - d. Reason Code: The Reason for the Credit
    - i. Reason Code Table is user-defined
    - ii. Settings > Global Setting Management > Tables Management > REASONCODE
5. Click the Save button when complete 
6. Enter the Line Items by expanding the Line Items and click the Add button 

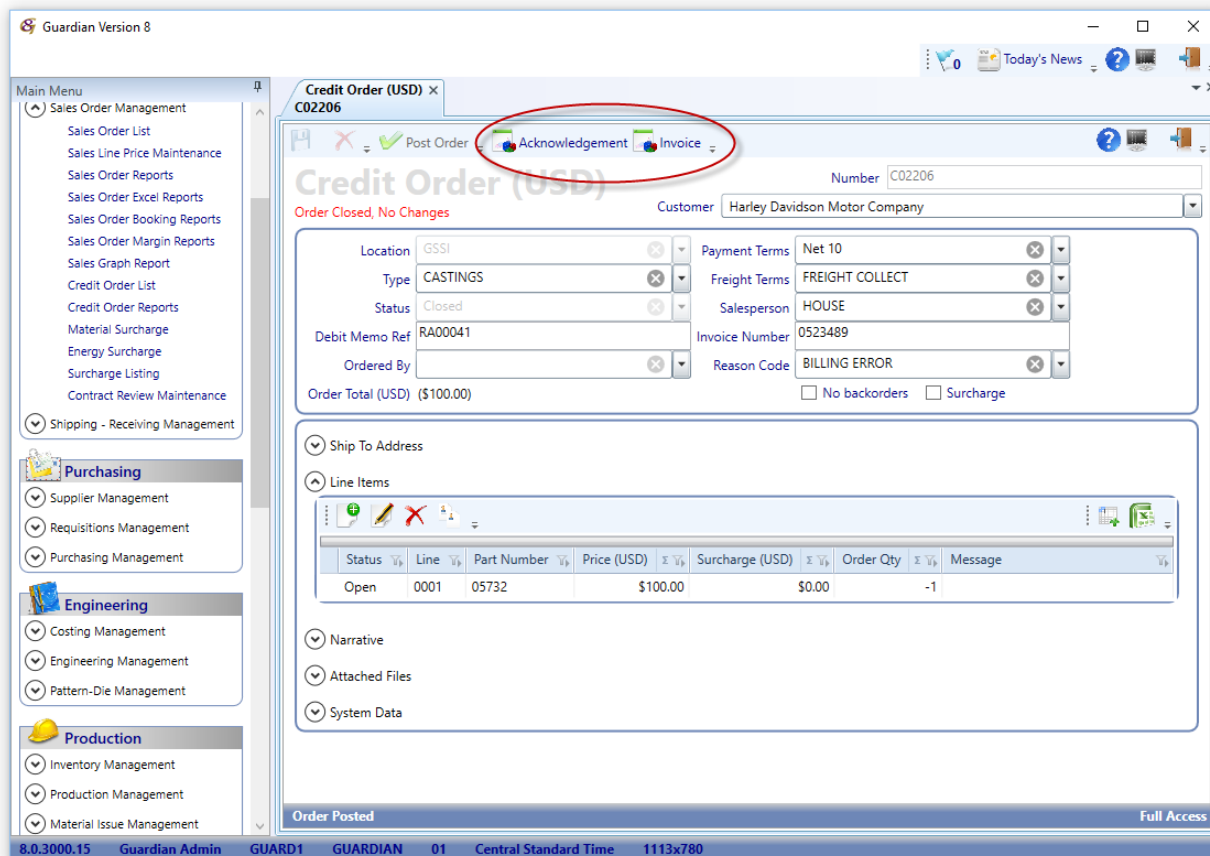
7. Enter or select the Part Number
8. Enter the Quantity...MUST be negative quantity
9. Click the Restock checkbox if returning parts to stock when you Post the Order
10. Click the Save button... the New button allows saving of the current line and creation of a new line in one click
11. Add additional lines as required...

12. When finished adding lines, Post the Order by clicking Post Order
  - a. ...restocks the parts into inventory

- b. ...posts transaction to record
- c. ...allows printing of credit invoice



## 13. Print or Email the Acknowledgement and/or Invoice



## 14. Sample Credit Memo:



### Credit Memo

#### Bill To - 000001

Harley Davidson Motor Company  
3700 W. Juneau Avenue  
Milwaukee, WI 53208  
US

Invoice #: C02206

Invoice Date: 4/27/2016

Page: 1 of 1

Order #: C02206

Packing List #: C02206

Tracking Number

#### Ship To

Harley Davidson Motor Company  
3700 W. Juneau Avenue  
Milwaukee, WI 53208  
US

#### Remit To

Attn: Accounts Receivable  
Guardian Software Systems, Inc.  
640 Armour Road  
Oconomowoc, WI 53066  
US

Debit Memo Ref	Release #	Sales Person	Ordered By
RA00041		HOUSE	
Payment Term	Freight Terms	Federal ID	Invoice Number
Net 10	FREIGHT COLLECT		0523489

		<a href="#">Back</a>						
Ordered	Shipped	Ordered	PO Line	Part Number	Weight	Price (USD)	Surcharge	Total (USD)
-1	-1	0		05732	-11.00	\$100.00000		(\$100.00)
				BUCKET & PIN ASSEMBLY				
				Inv				

Invoice Total (USD) (\$100.00)

fmInvoice20160413