How to Create a Credit Memo.

This video will show users how to Create a Credit Memo.

Navigate to Accounting, Credit Memo, New Entry.
Fill in header info, accounts line entry, and description.
Click Confirm and then Post.

STEP-BY-STEP:
1. Go to Accounting menu
2. Select Credit Memo
3. Fill in the header info, i.e. Partner Account, Description, etc
4. Add account lines (Description, Amount, Tax)
5. Click Confirm Credit Memo button when done editing
6. Click Post Credit Memo button to post the entries
7. To undo post and modify the Credit Memo document, click the triangle on the Generate Report button. Select Undo Credit Memo Posting option.
Only user with access right able to do this.
8. Click Generate Report button to preview and print the Credit Memo
9. Click Generate Document button to create a similar (copy) the Credit Memo document
10. In the Postings tab, user can view the posted journal entries of the Credit Memo.
11. In the Notes/Attachments tab, user can add notes and attachment files for the Credit Memo document
12. Click the List View button to see the list of Credit Memo documents for the selected period