

Using a Credit Note

11 Steps [View most recent version](#) 

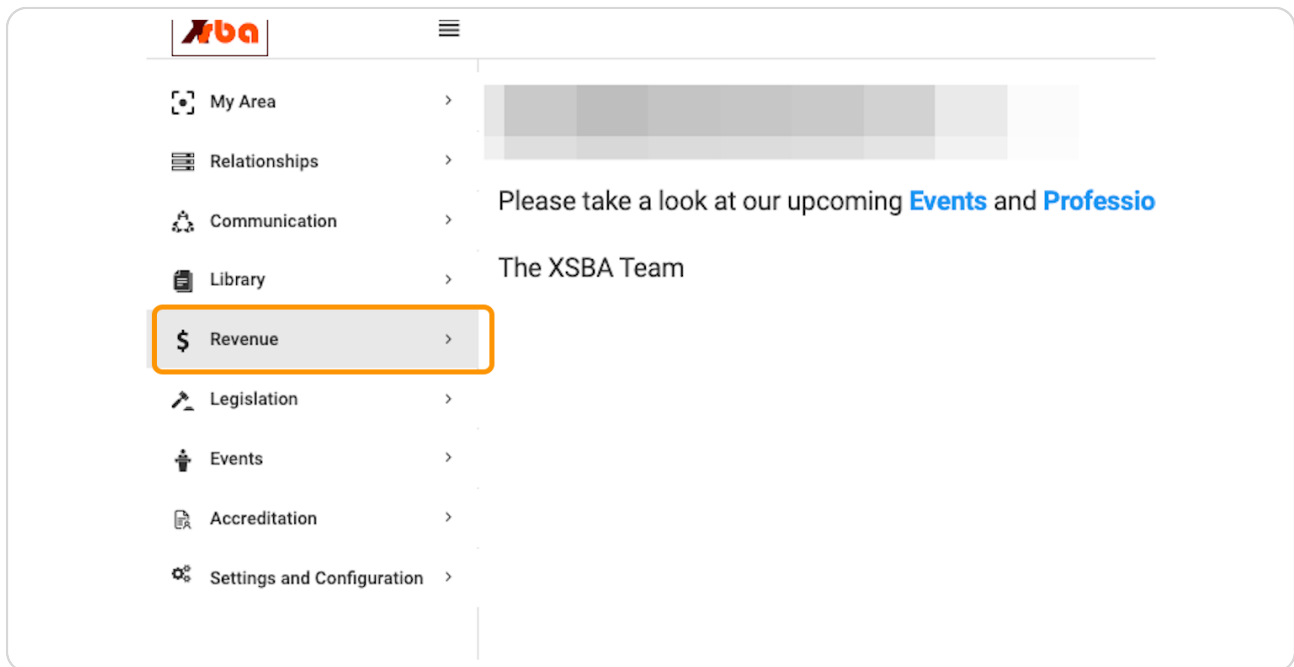
Created by
Engagifii Inc.

Creation Date
November 22, 2023

Last Updated
November 22, 2023

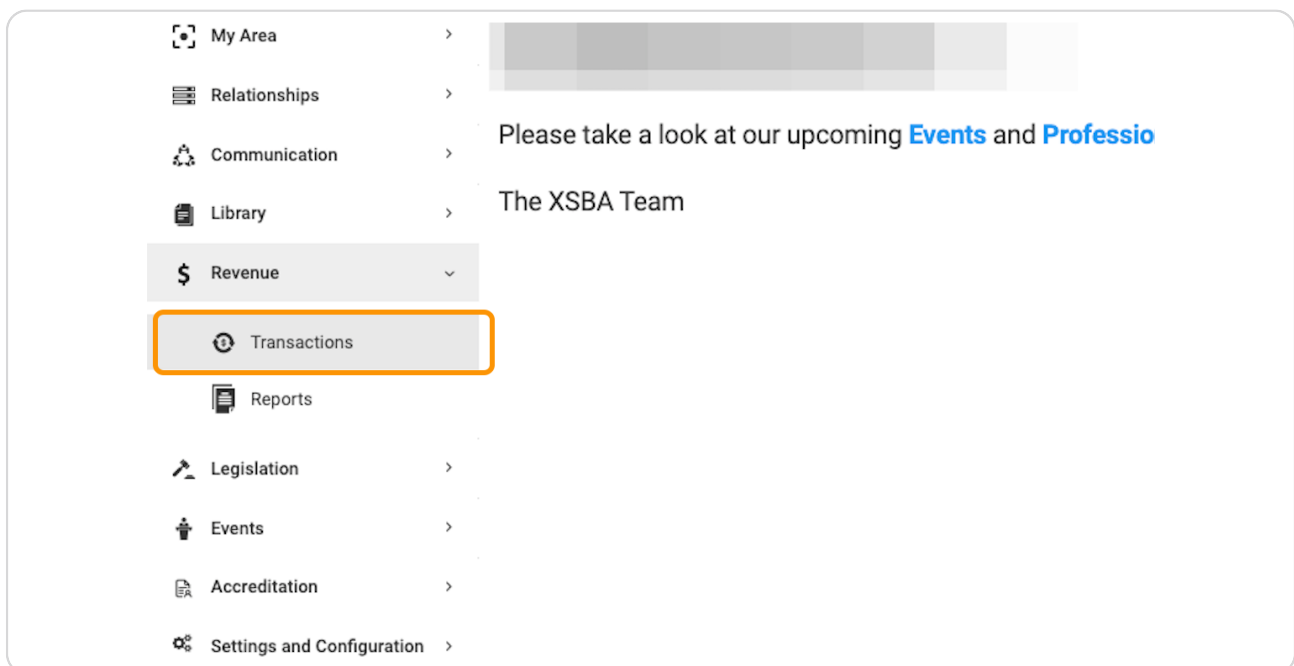
STEP 1

Click on Revenue



STEP 2

Click on Transactions



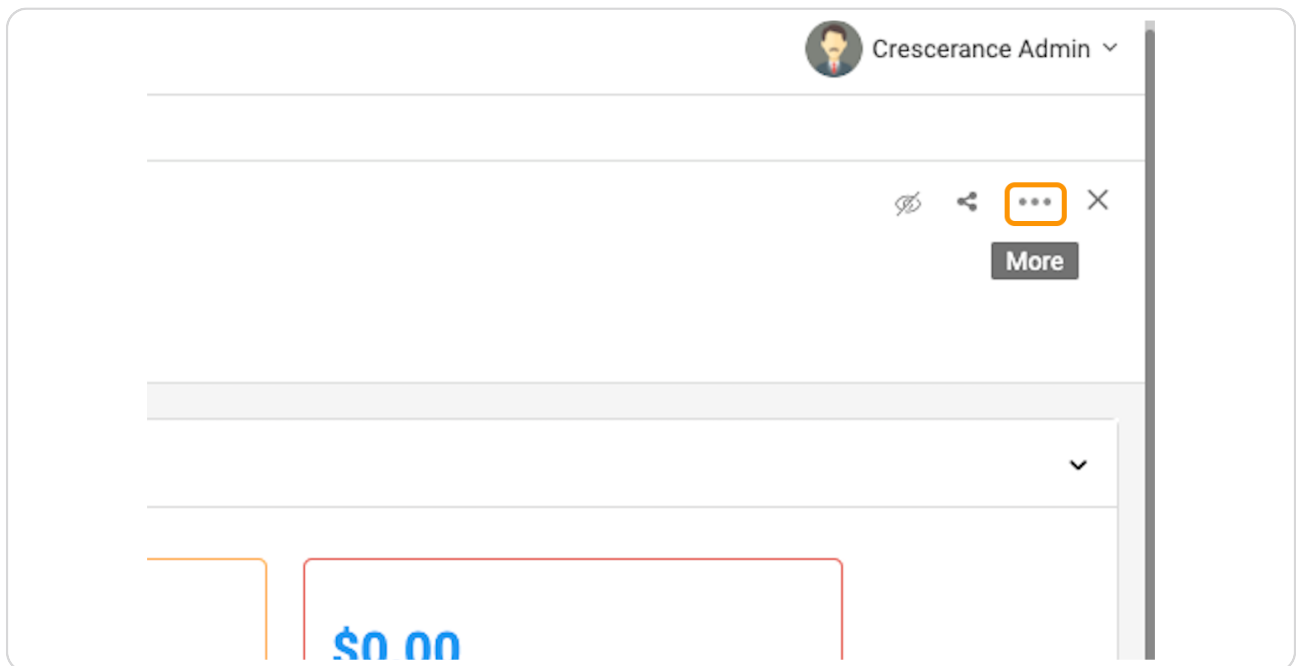
STEP 3

Select the Credit Note you wish to use from the list of all transactions

Favorite	Type	ID	Search Buyer Name or Org Name
★	Invoice	Inv 10000094	Lebanon City School Crescerance Admin
★	Credit Note	Cn 10000005	Lebanon City School Crescerance Admin
★	Invoice	Inv 10000093	Lebanon City School Crescerance Admin
★	Payment	Pmt 10000031	Lebanon City School Crescerance Admin

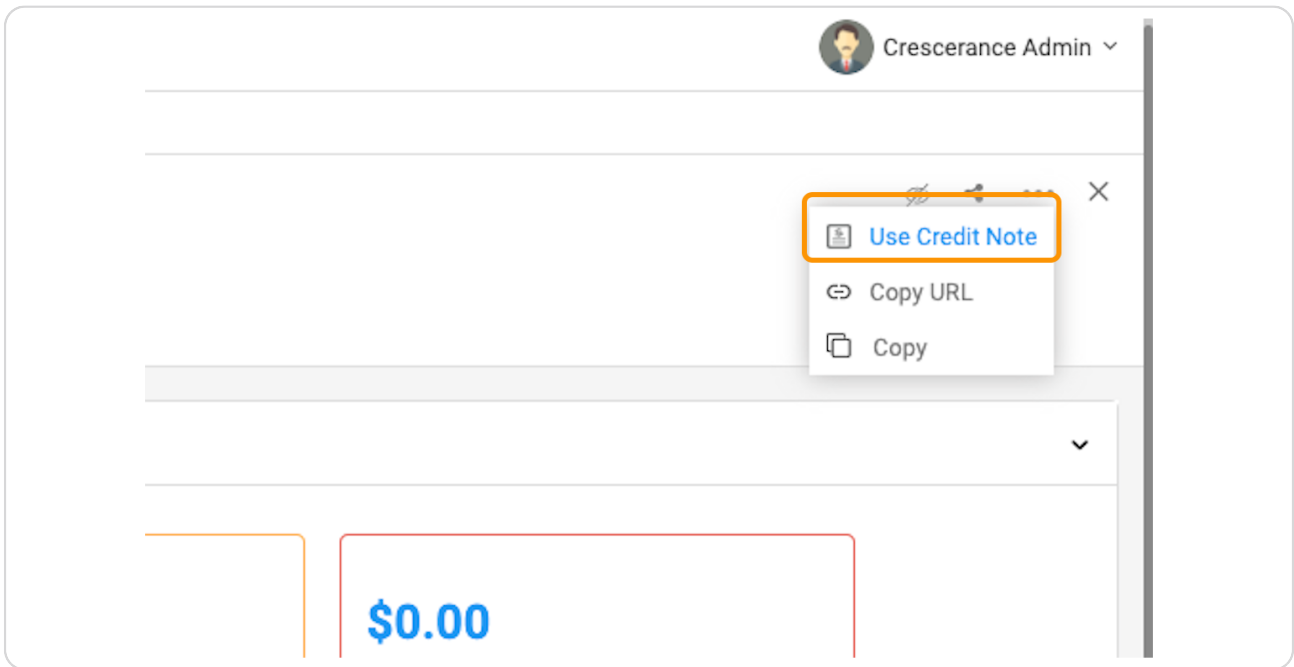
STEP 4

Click on the three dots



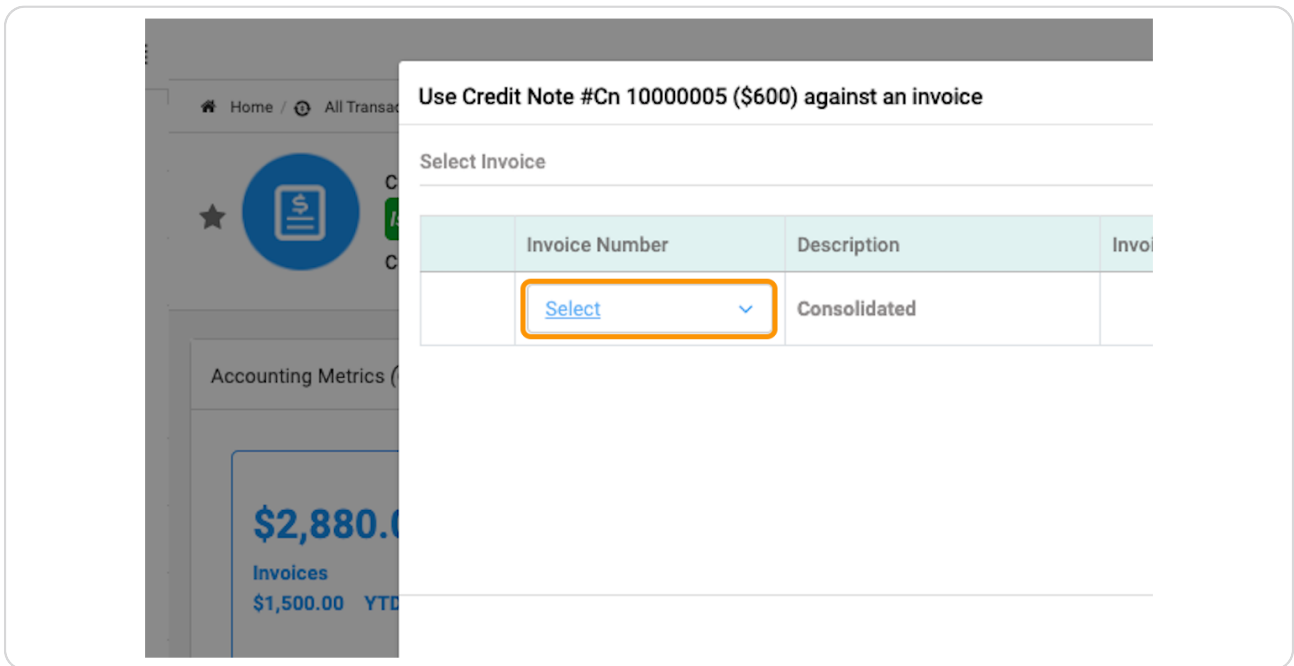
STEP 5

Click on Use Credit Note



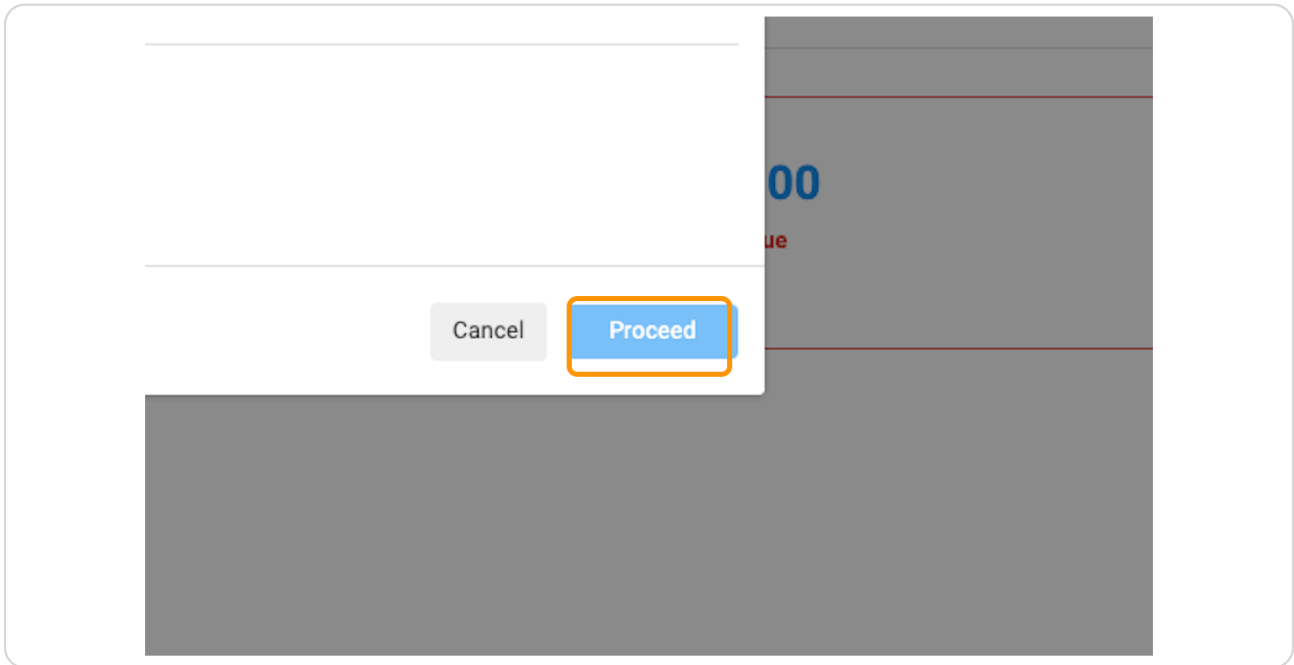
STEP 6

Click on Select to apply against an existing unpaid invoice



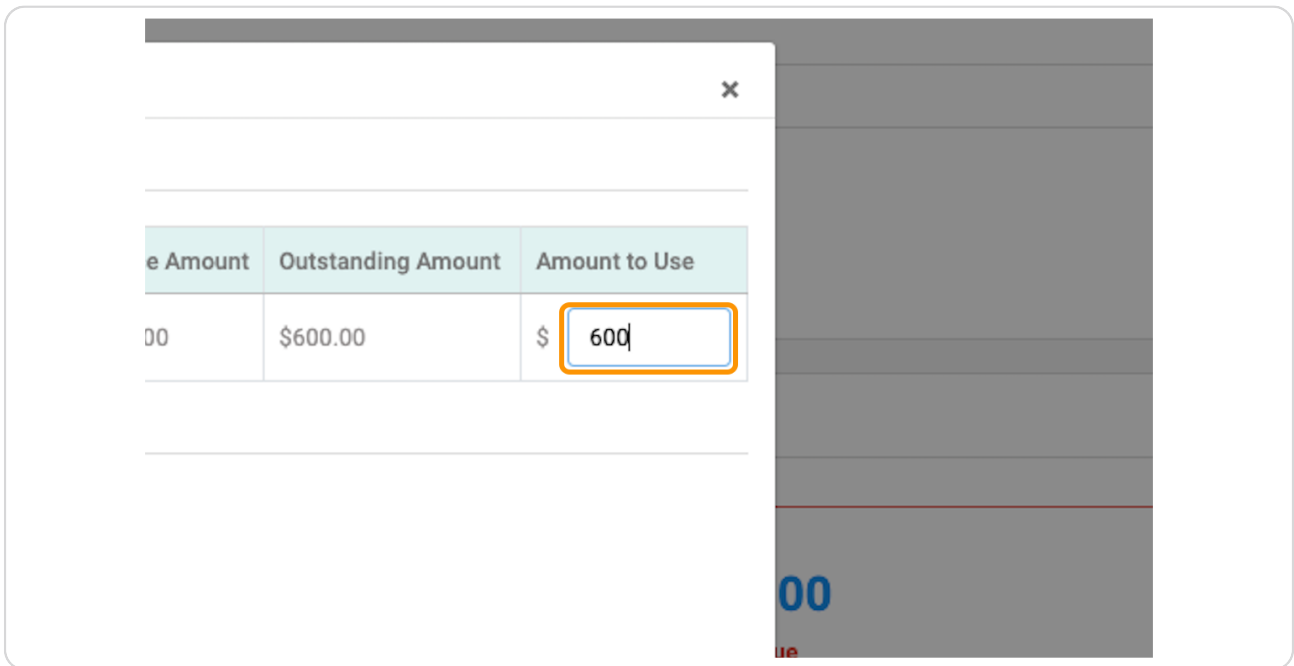
STEP 7

Select invoice from the drop down list



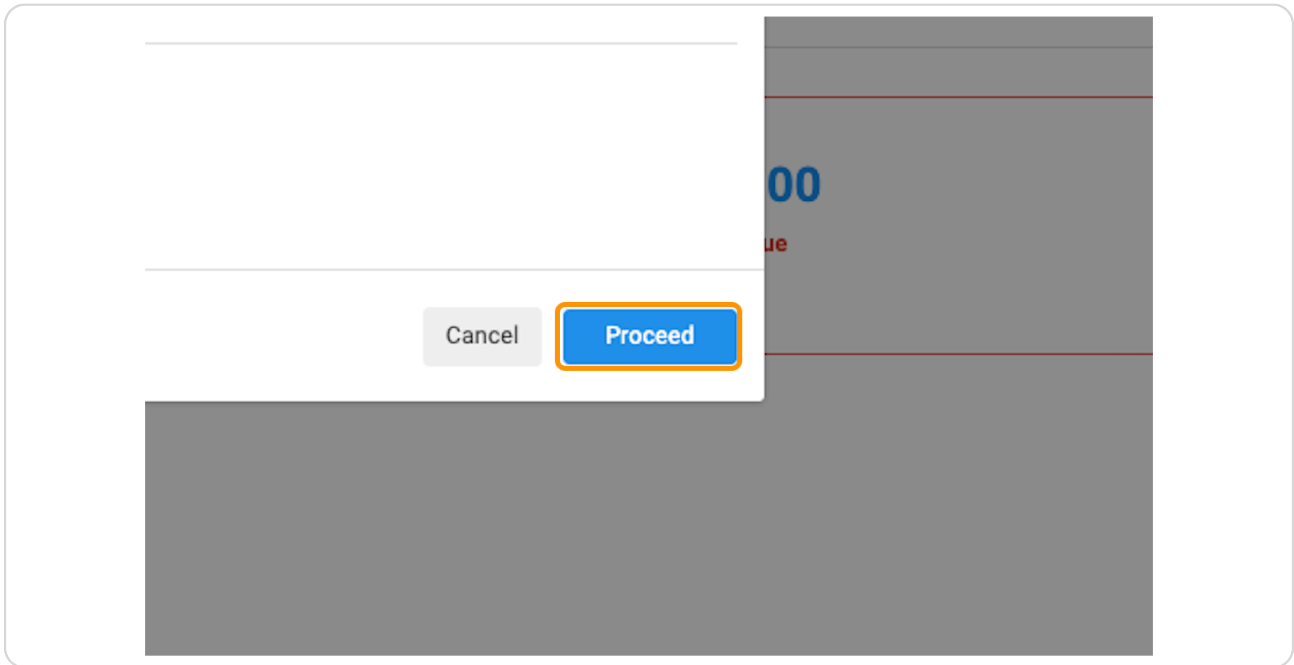
STEP 8

Type amount of credit you wish to use to pay this invoice



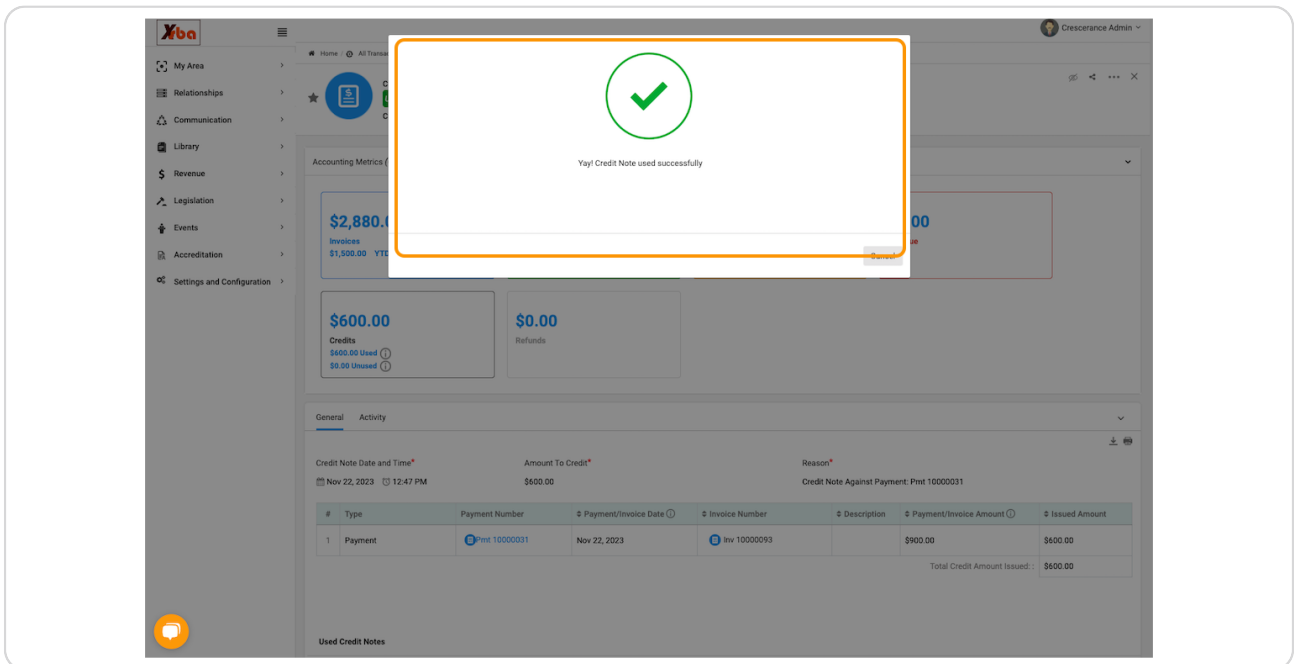
STEP 9

Click on Proceed



STEP 10

Window pops up letting you know credit was applied successfully



STEP 11

From the details view, you can see amount of credits and credits used

Legislation >

Events >

Accreditation >

Settings and Configuration >

\$2,880.00
Invoices
\$1,500.00 YTD

\$2,280.00
Payments
\$900.00 YTD

\$600.00
Credits
\$600.00 Used ⓘ
\$0.00 Unused ⓘ

\$0.00
Refunds

General Activity

Credit Note Date and Time*	Amount To Credit*
📅 Nov 22, 2023 ⌚ 12:47 PM	\$600.00

