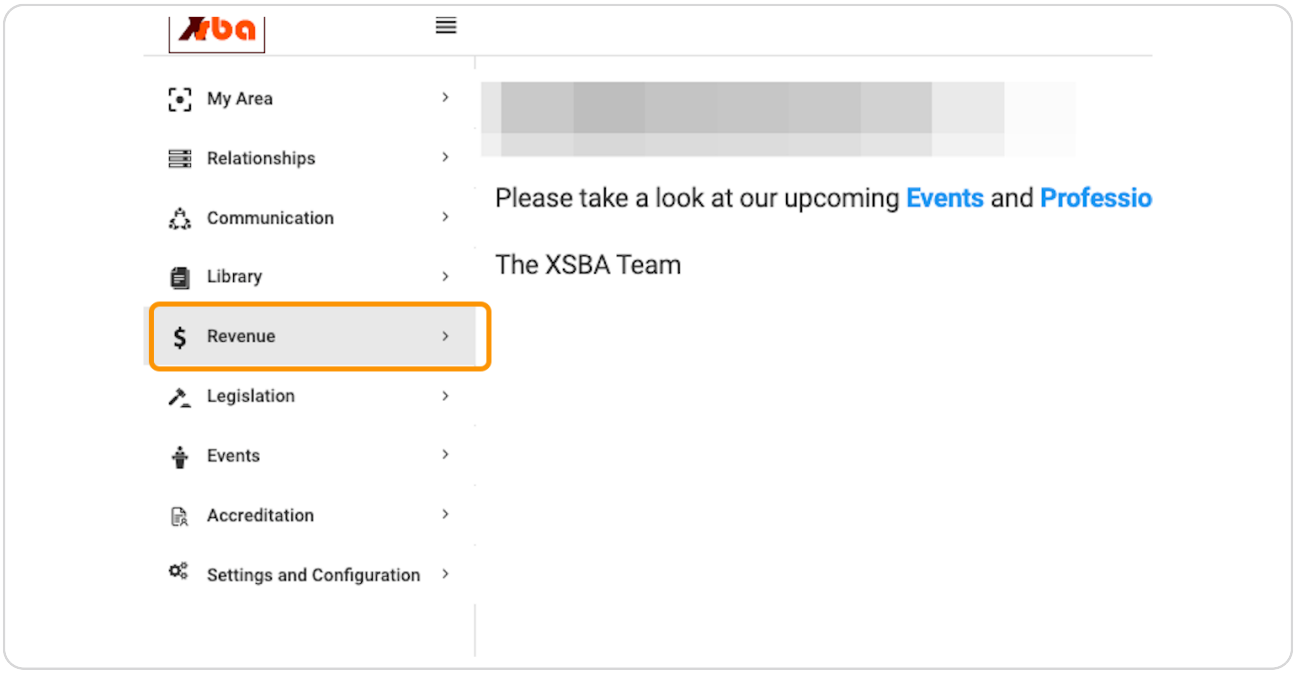
Using a Credit Note

11 Steps View most recent version

Created by	Creation Date	Last Updated
Engagifii Inc.	November 22, 2023	November 22, 2023

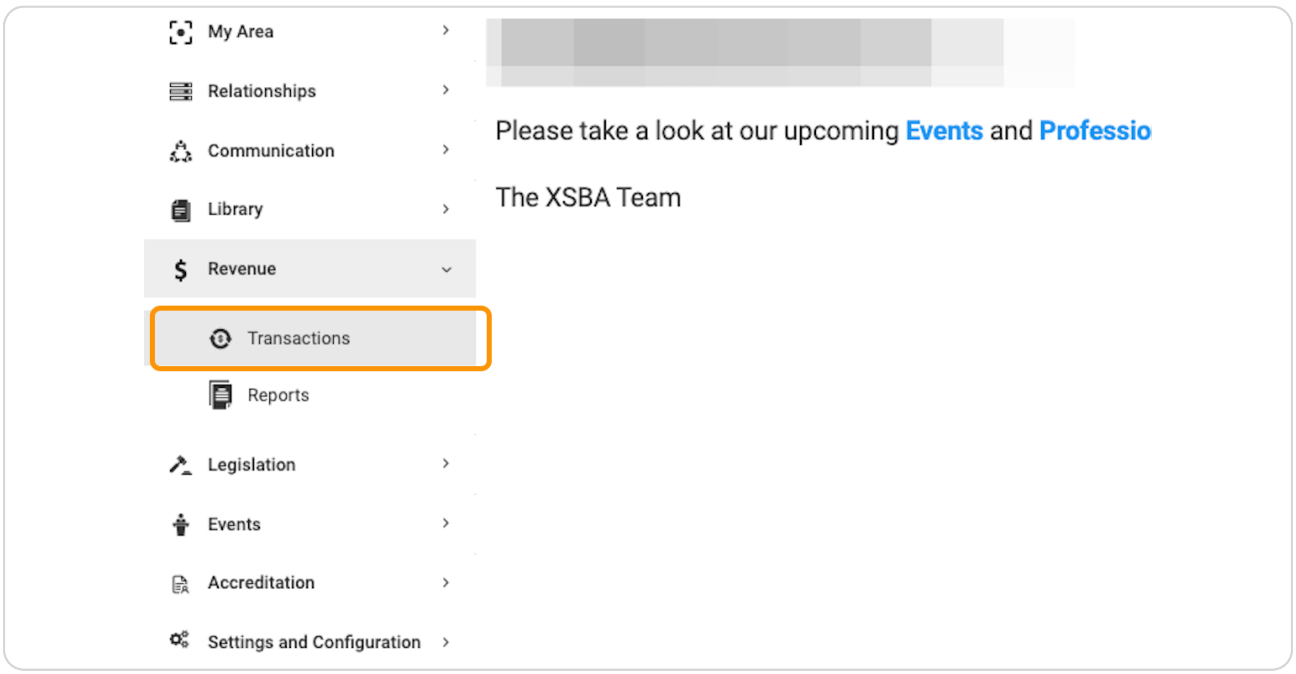
STEP 1

Click on Revenue



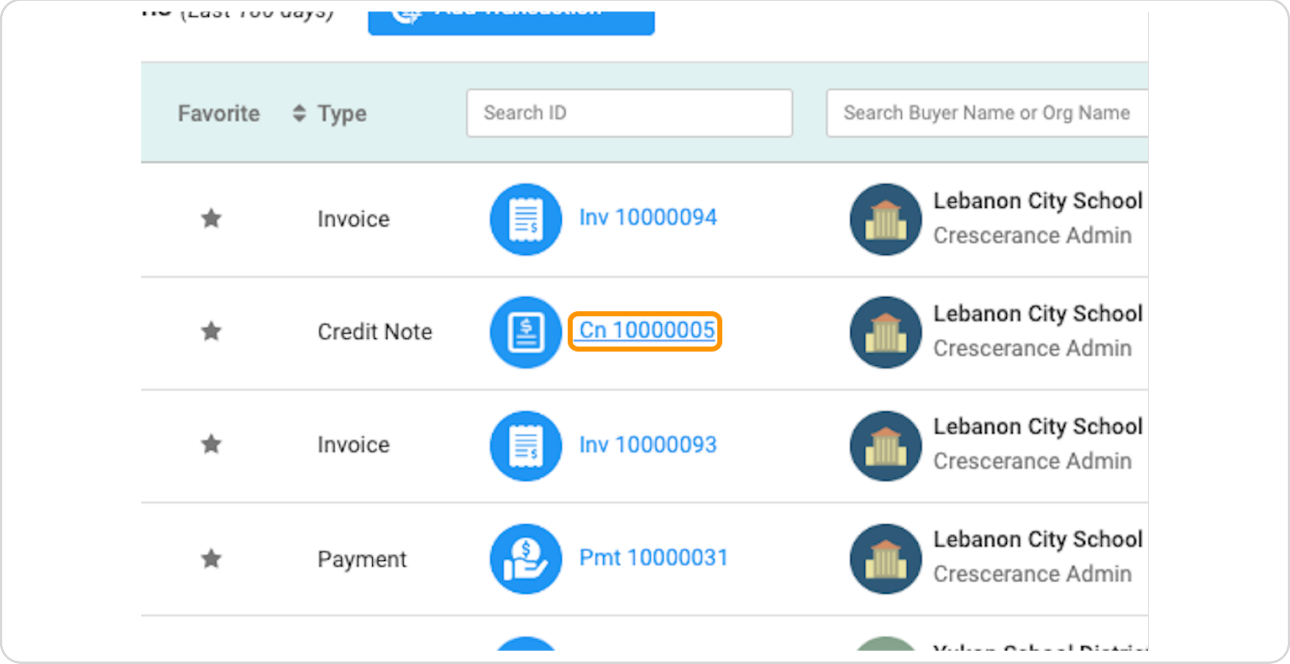
STEP 2

Click on Transactions



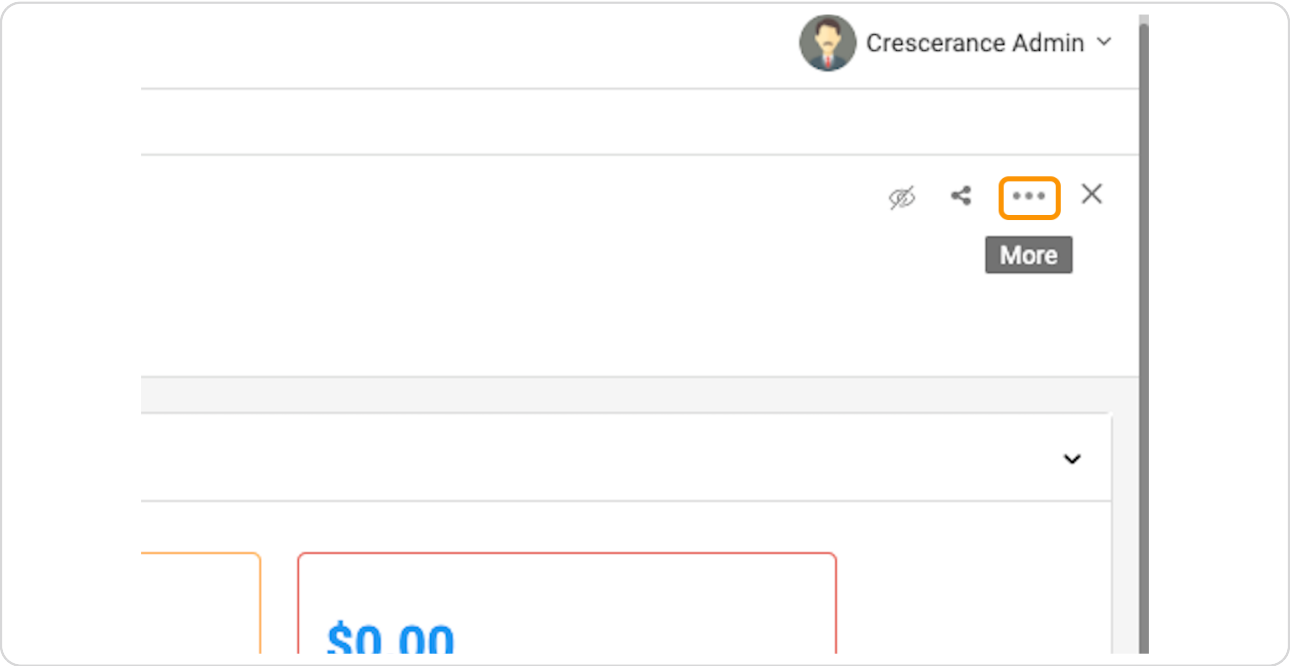
STEP 3

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



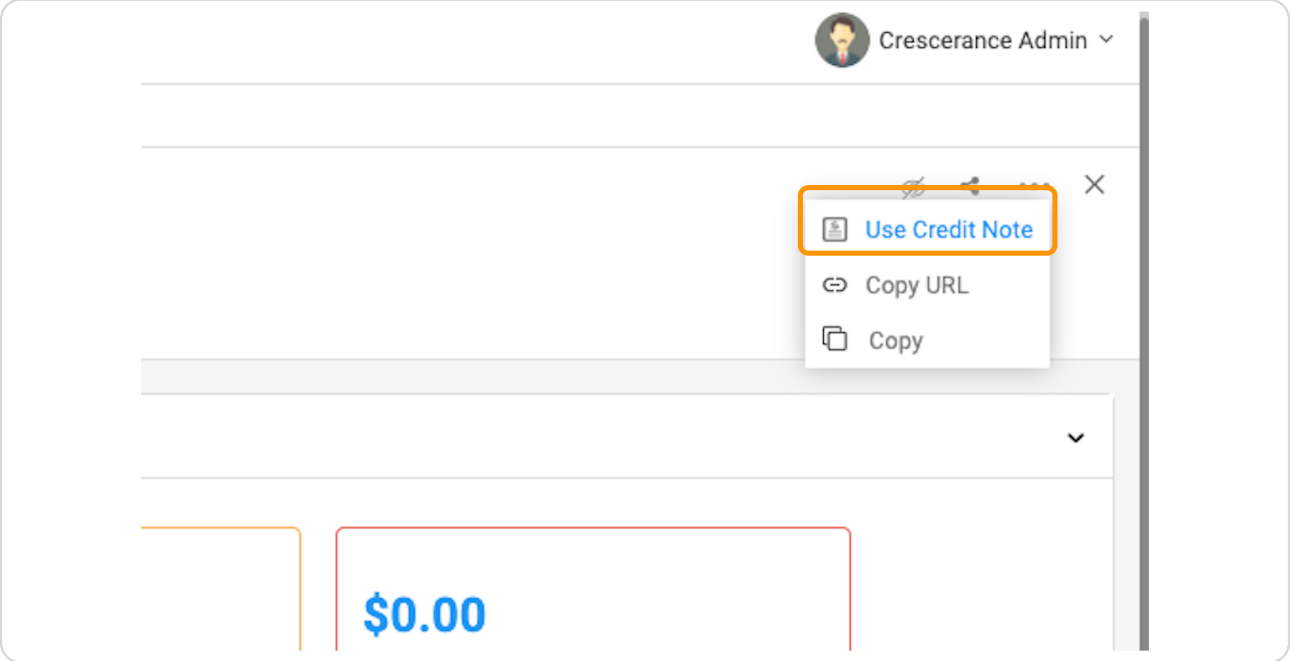
STEP 4

Click on the three dots



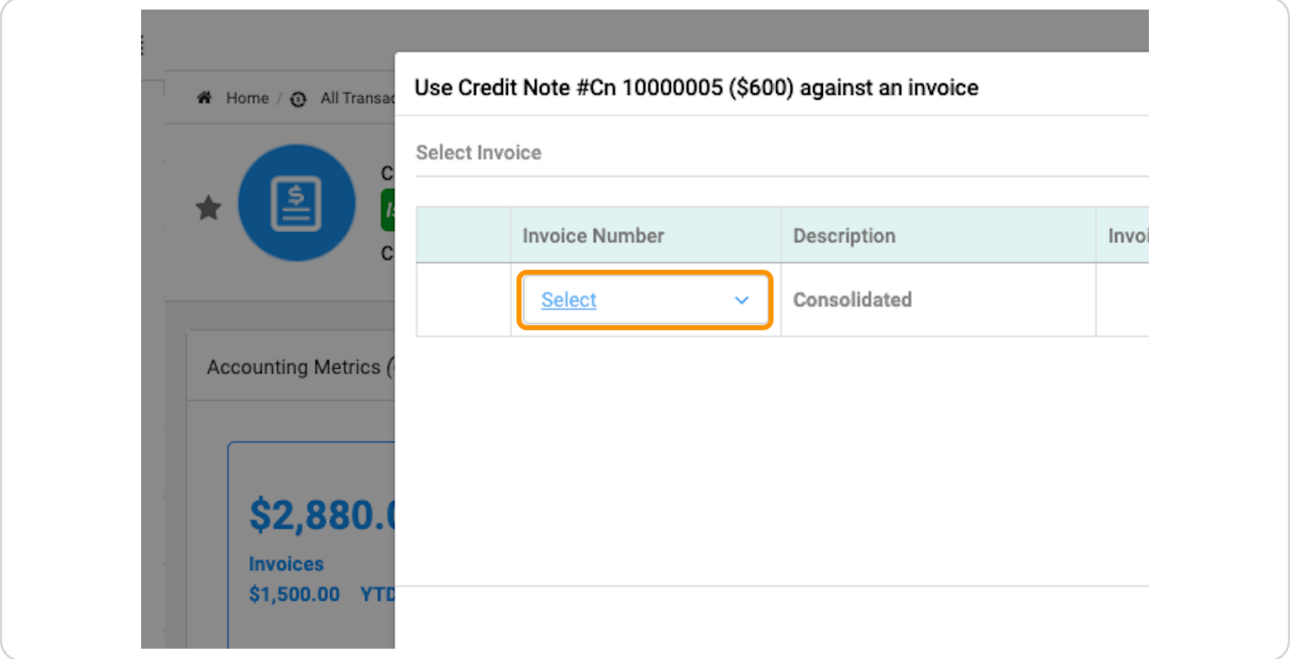
STEP 5

Click on Use Credit Note



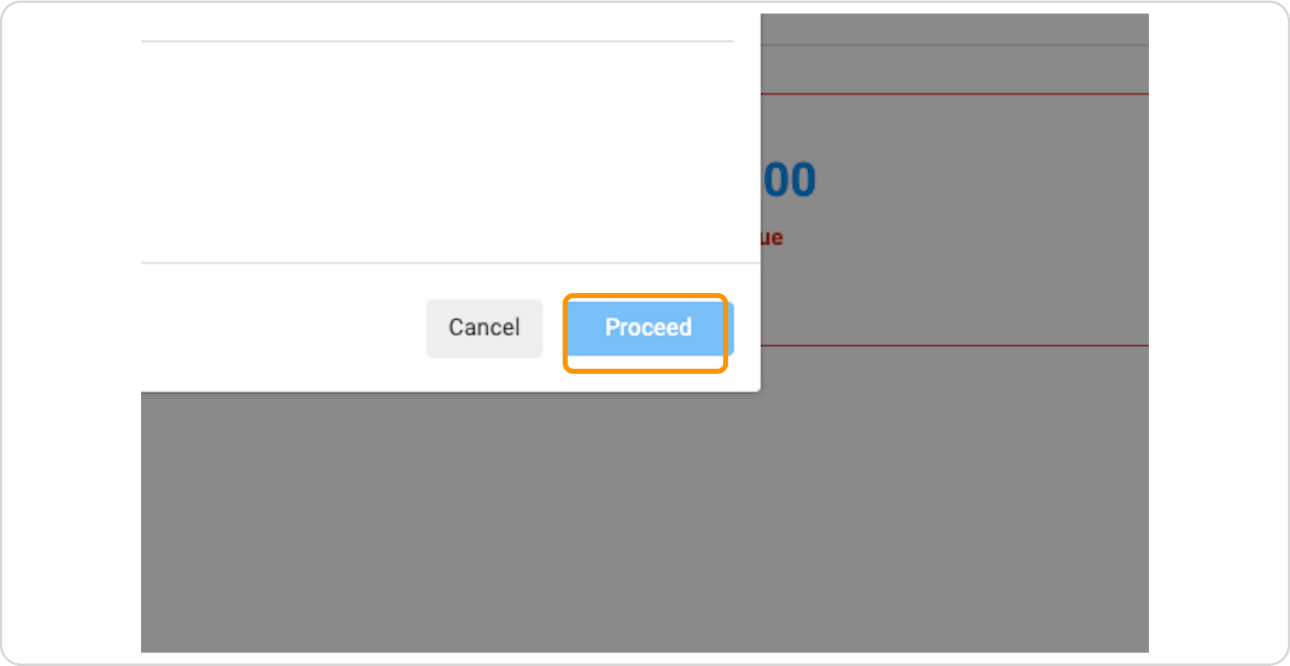
STEP 6

Click on Select to apply against an existing unpaid invoice



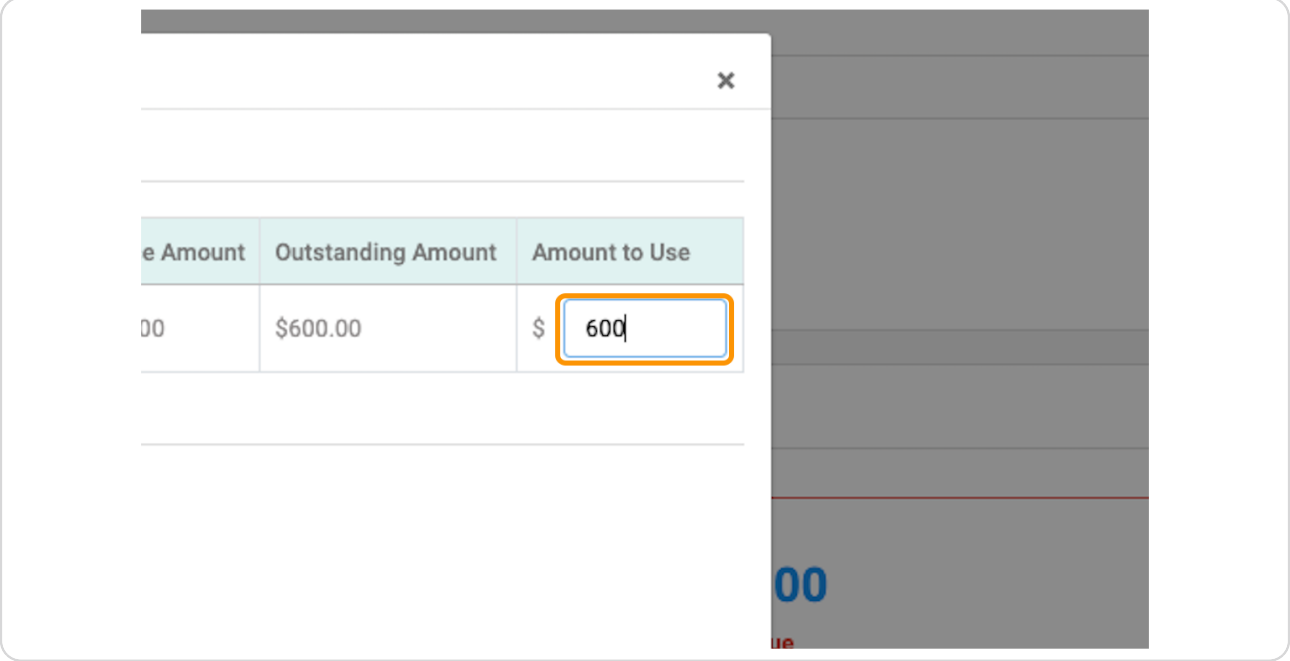
STEP 7

Select invoice from the drop down list



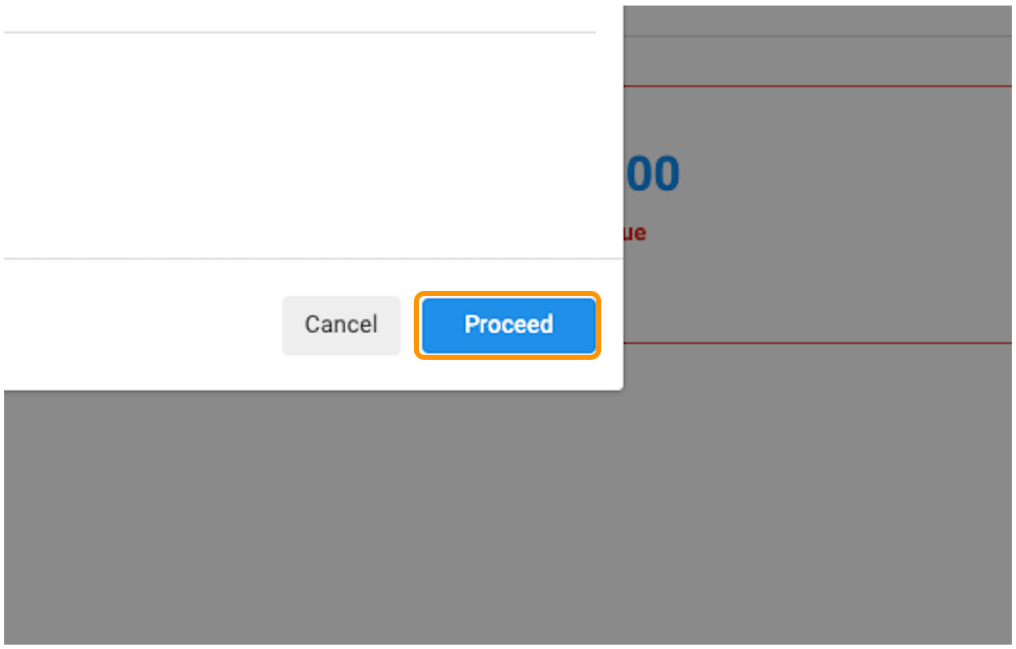
STEP 8

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



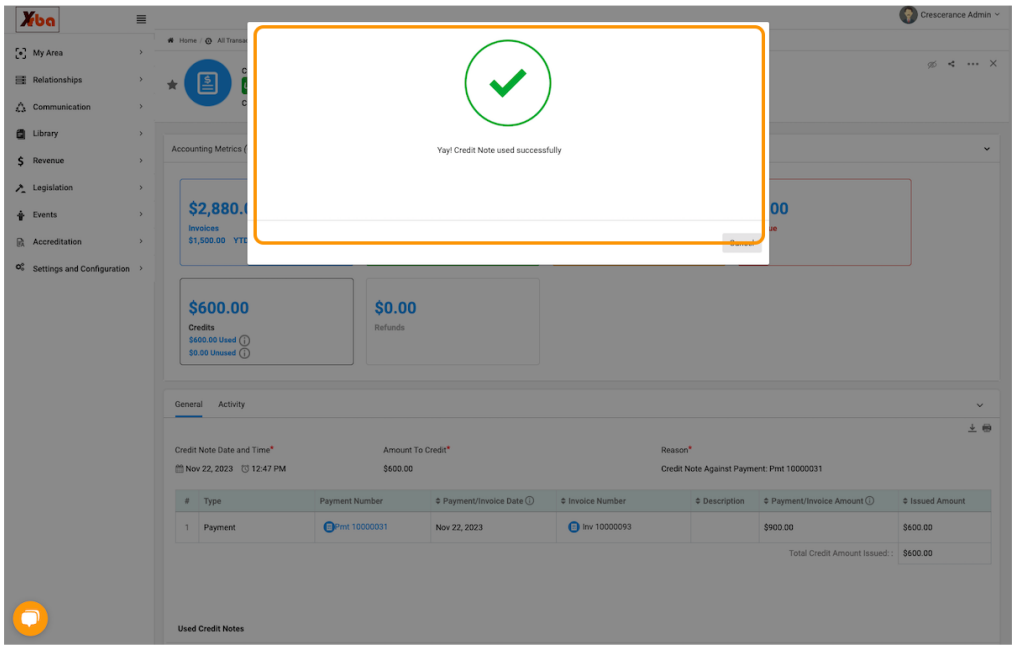
STEP 9

Click on Proceed



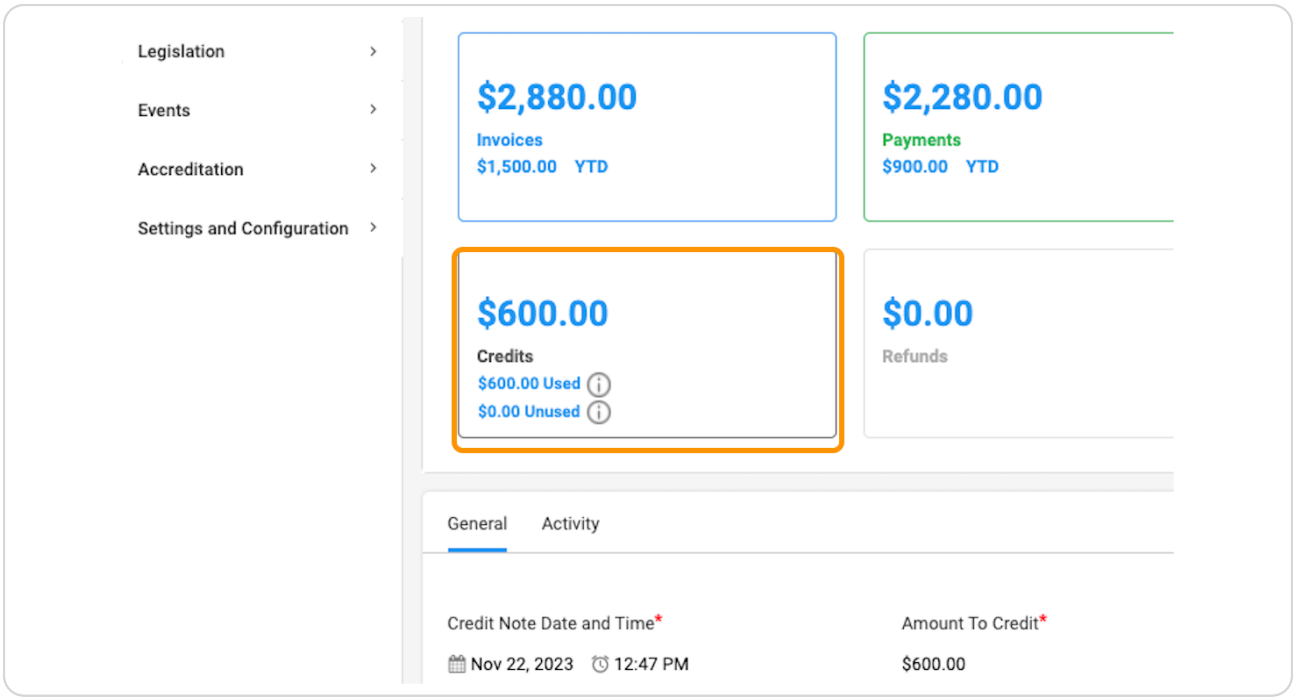
STEP 10

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



Engagifii