Batching A Credit Memo In Finex

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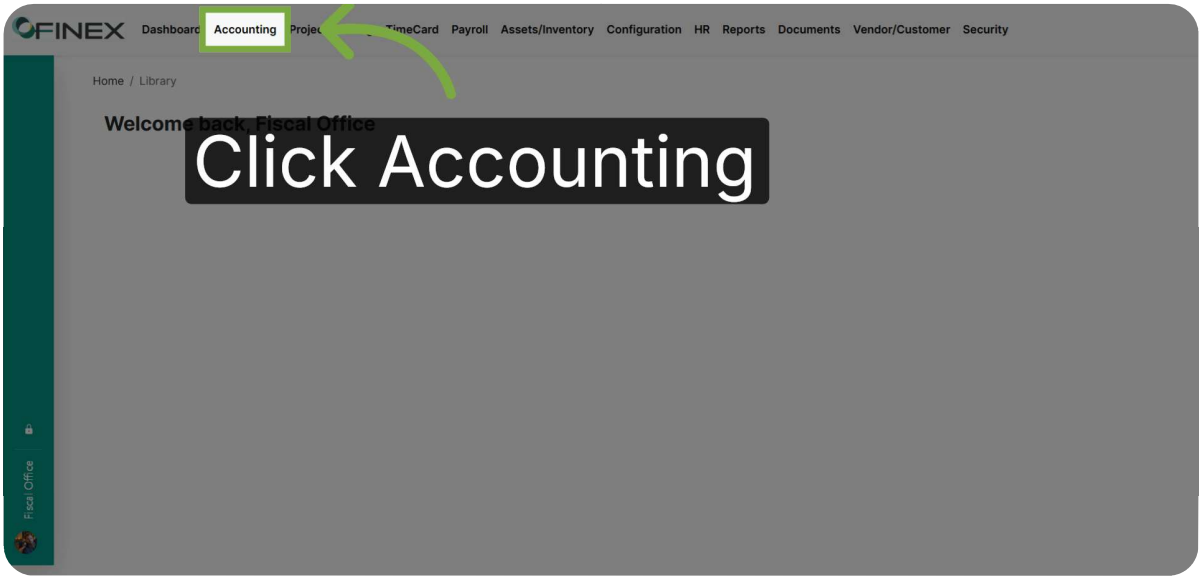
This tutorial guides you through batching a Credit Memo in Finex.

Go to www.finexweb.com

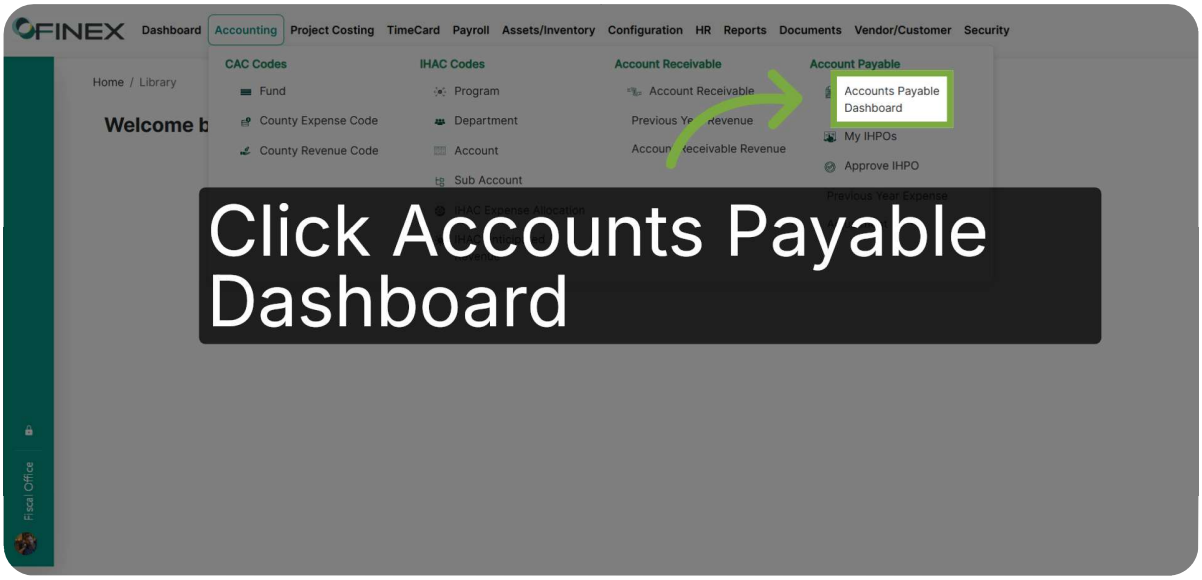
01 Access Accounting Section

Click Accounting to access the Financial section of Finex.



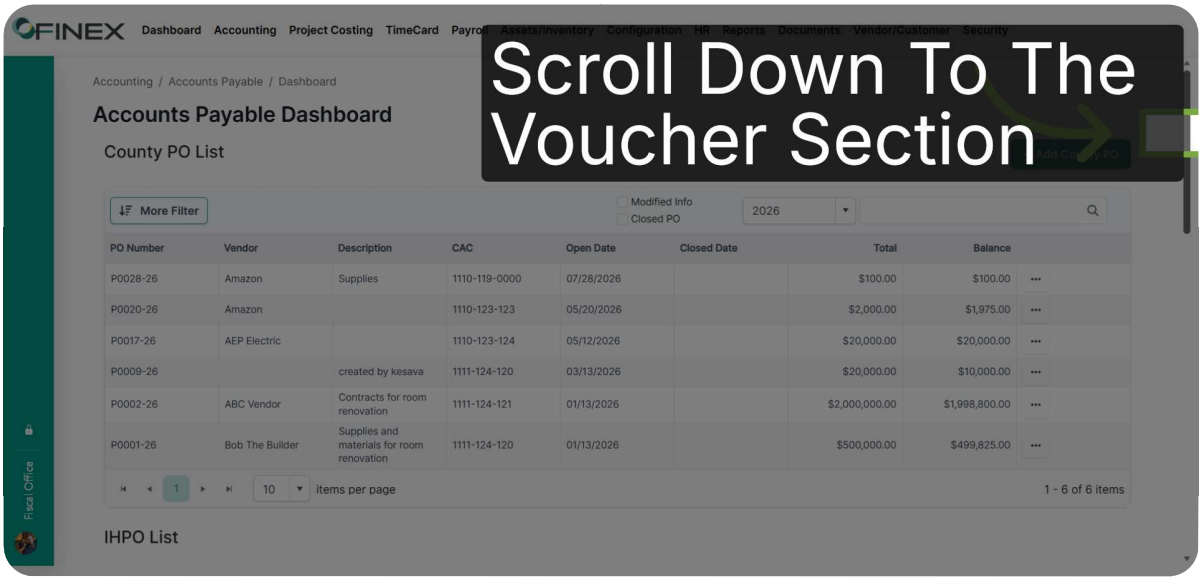
02 Open Accounts Payable Dashboard

Click the Accounts Payable Dashboard to access where you can batch Vouchers and Credit Memos.



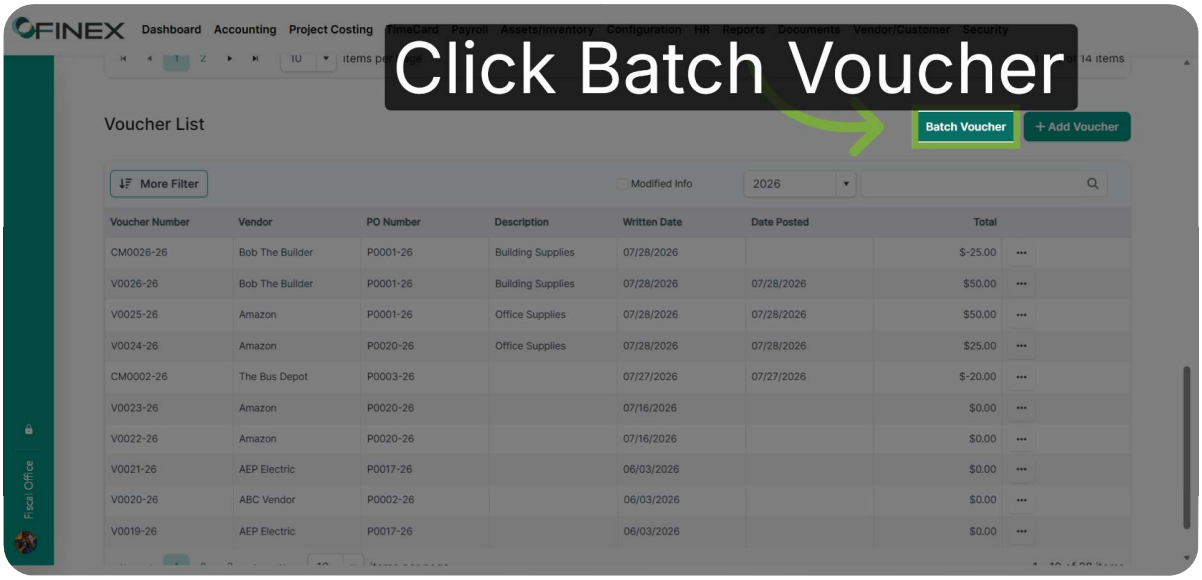
03 Scroll To The Bottom Of The Accounts Payable Dashboard

Scroll to the bottom of the Accounts Payable Dashboard to access the Voucher and Credit Memo section.



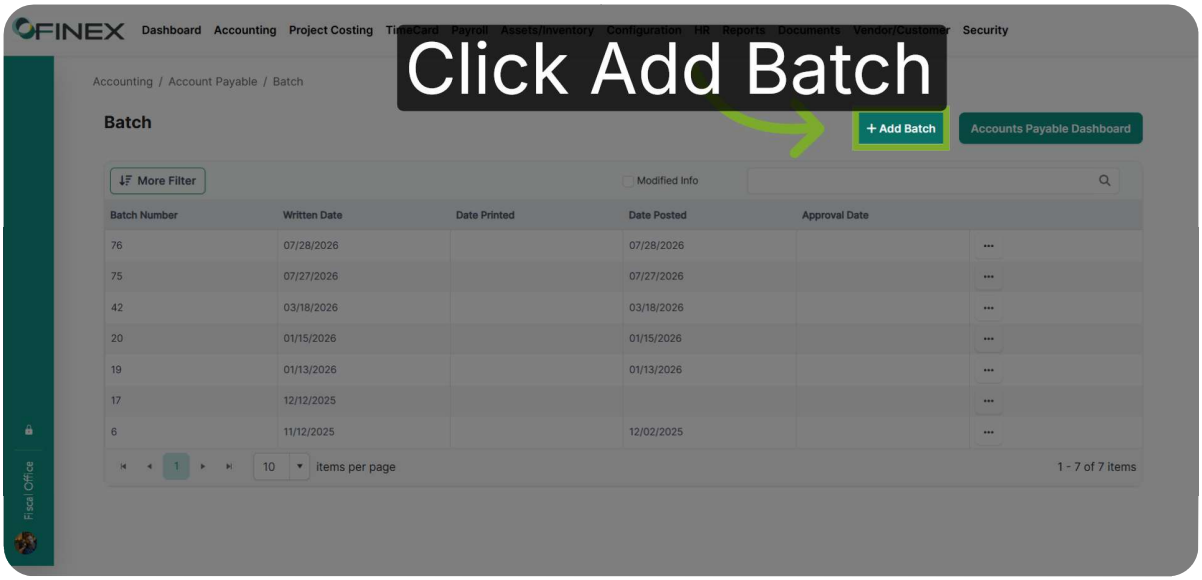
04 Select Batch Voucher

Click Batch Voucher to access what you can batch your Credit Memo.



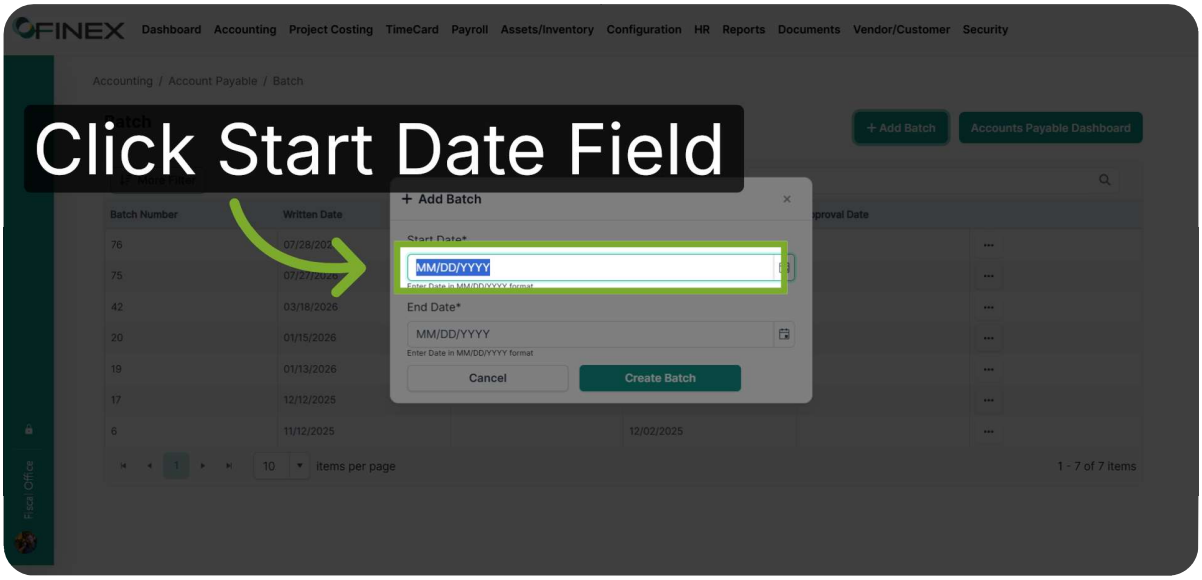
05 Select Add Batch

Click Add Batch to start the process of batching your Credit Memos. Credit Memos do not have to be batched separately from Vouchers. This is being done for training purposes.



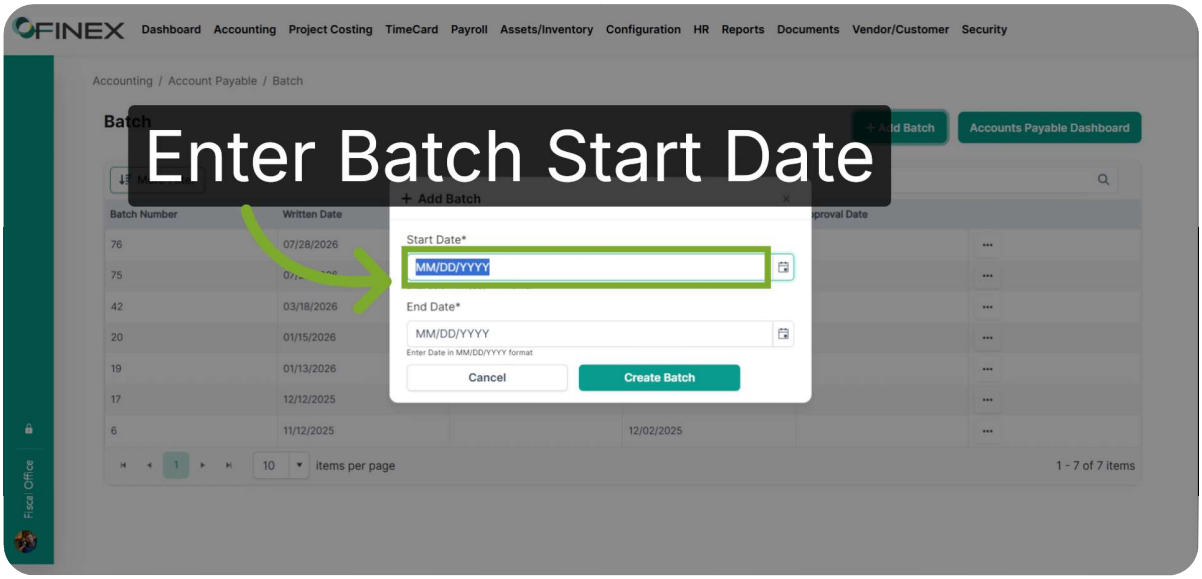
06 Select Batch Start Date Field

Click the Start Date field.



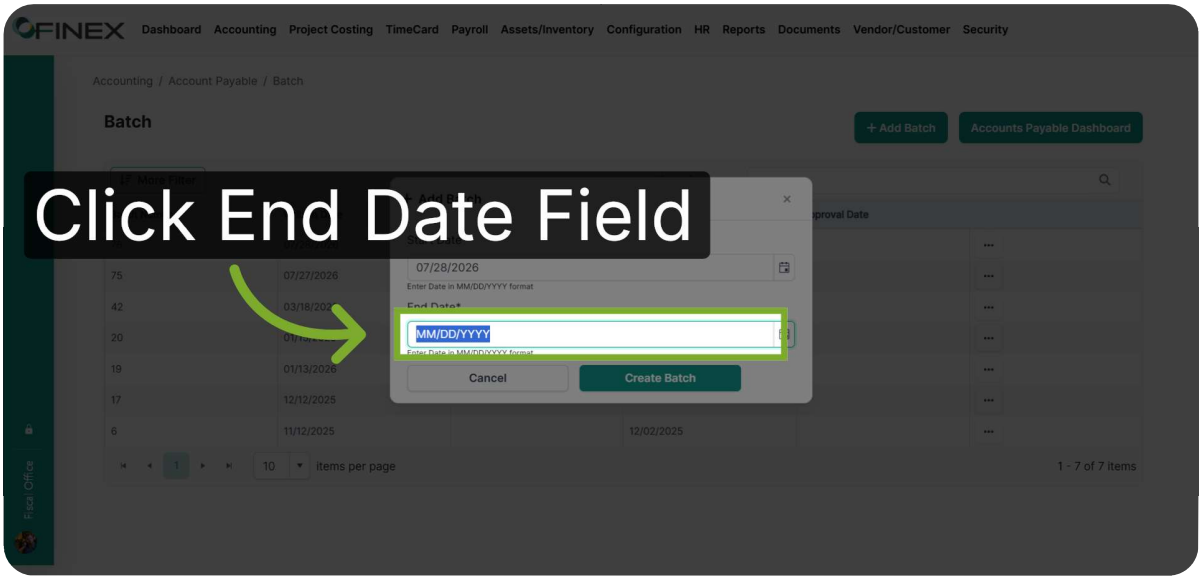
07 Enter Batch Start Date

Enter the start date for your batch.



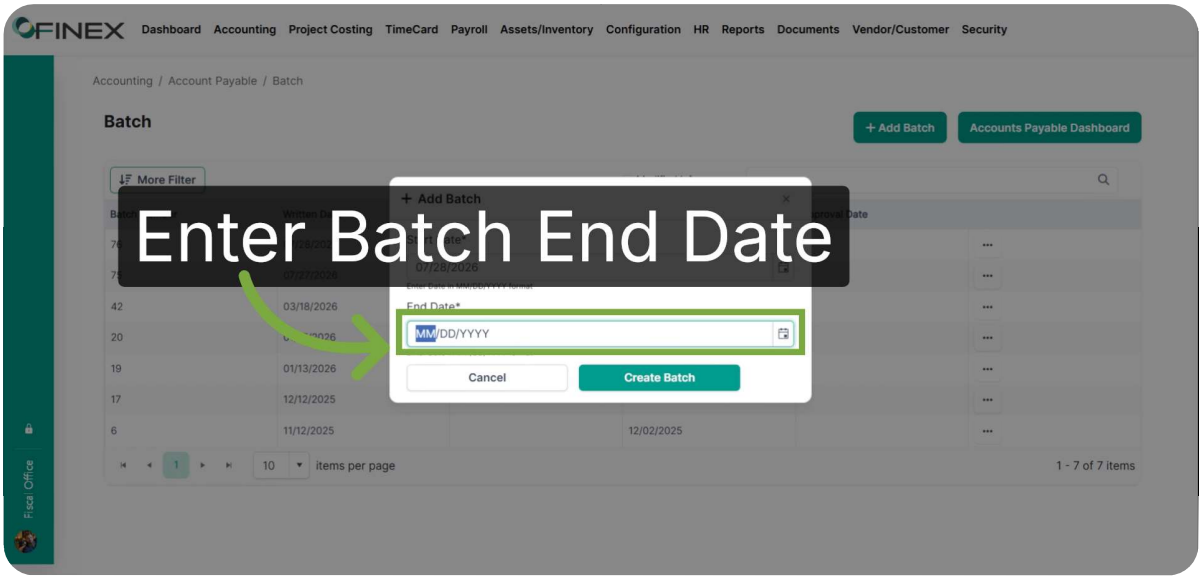
08 Select Batch End Date

Click the End Date field.



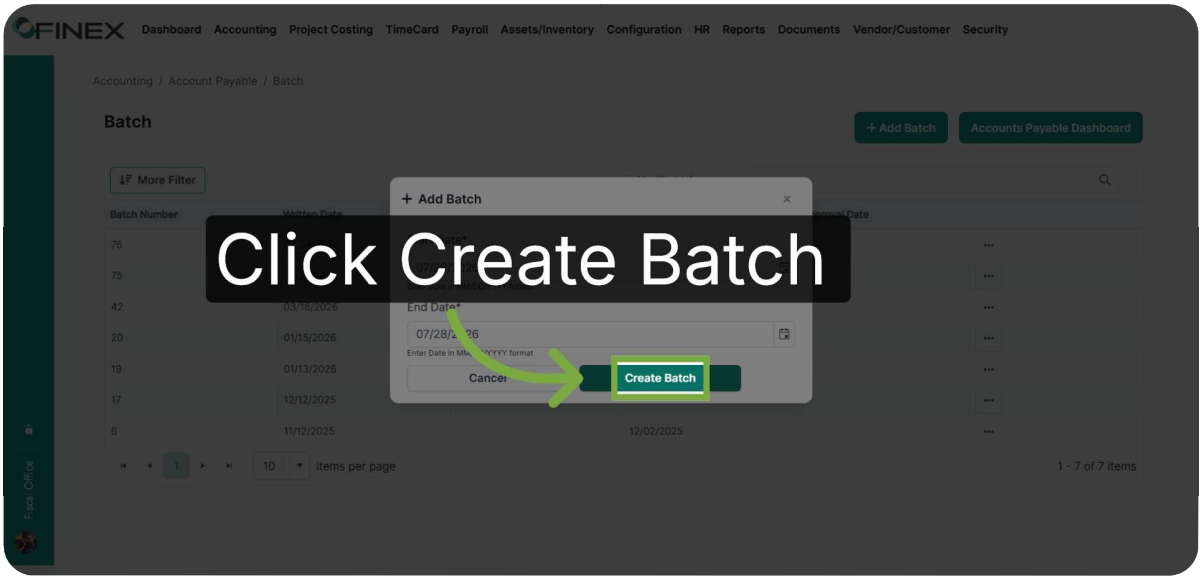
09 Enter Batch End Date

Enter your batch end date.



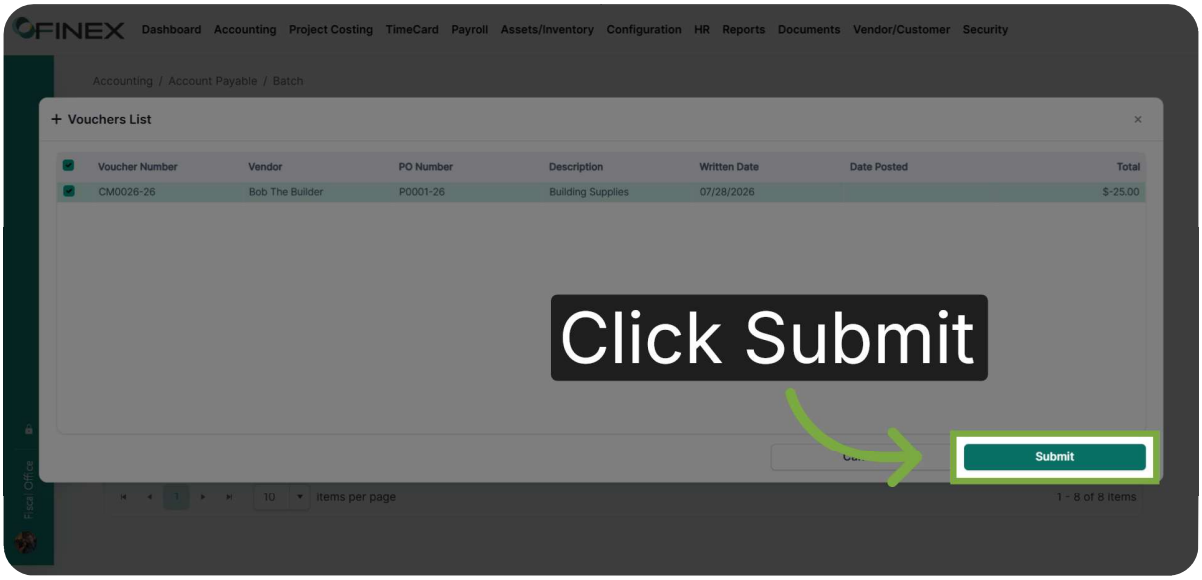
10 Select Create Batch

Click Create Batch to view your batch.



11 Select Submit

Click Submit to complete your batch.



You have now successfully batched a Credit Memo in Finex.

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