Creating A Credit Memo In Finex

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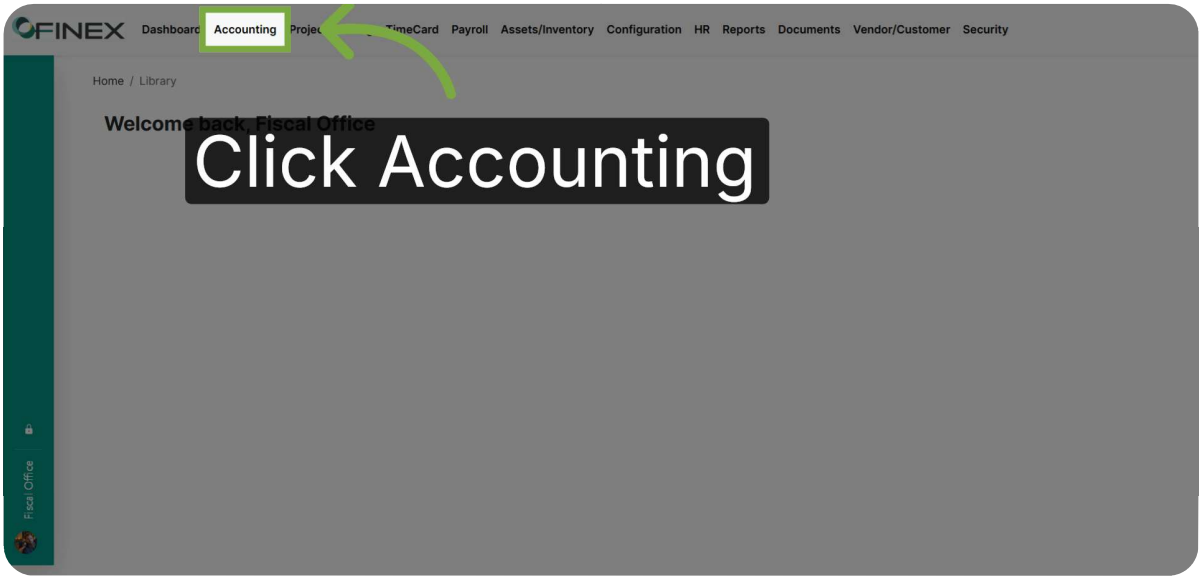
This tutorial guides you through creating a Credit Memo in Finex.

Go to www.finexweb.com

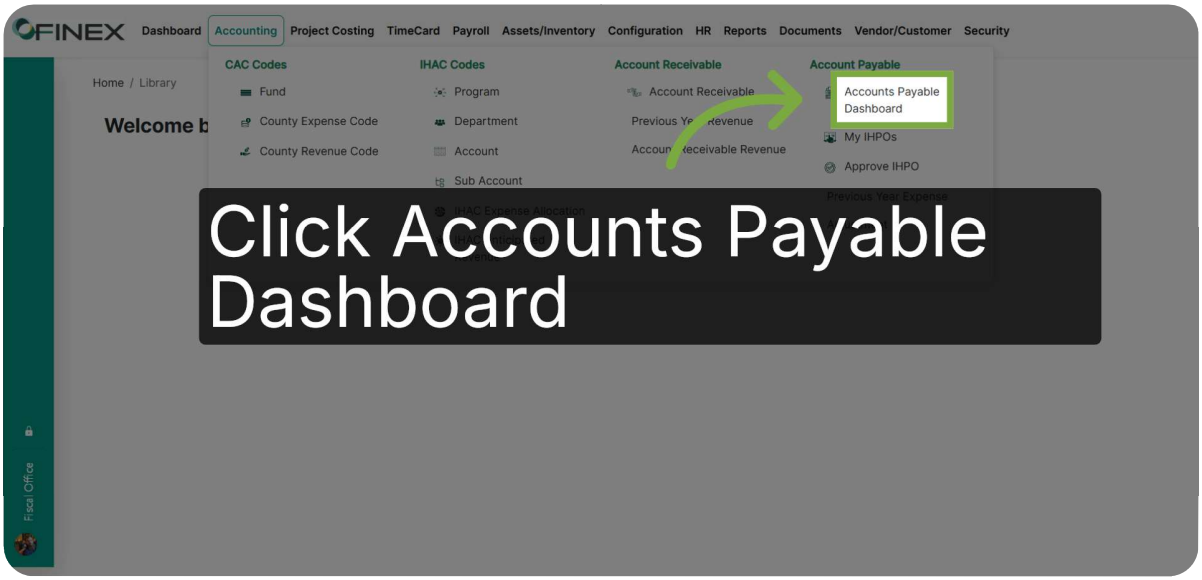
01 Navigate to Accounting

Click Accounting to access the Financial section of Finex.



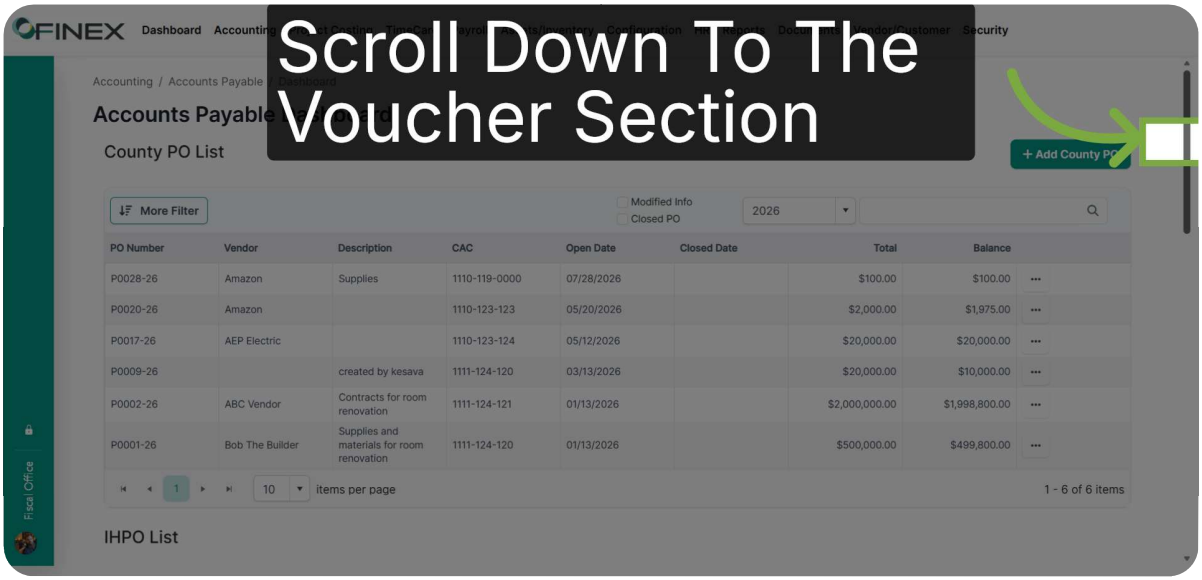
02 Open Accounts Payable Dashboard

Click the Accounts Payable Dashboard to access where you can create, edit, and manage your Credit Memos.



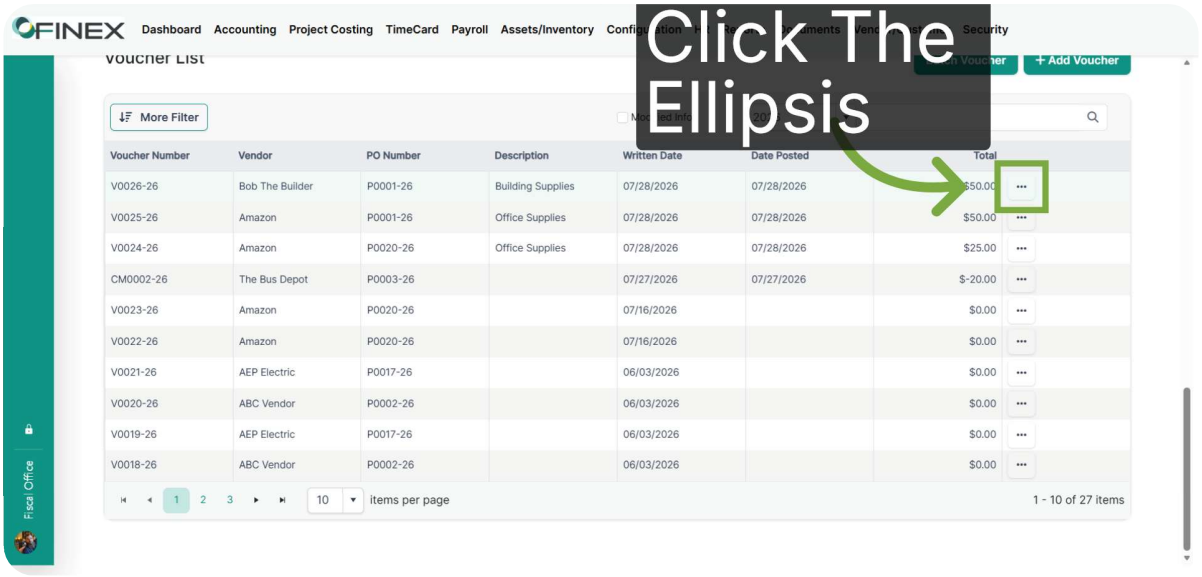
03 Scroll To The Bottom Of The Accounts Payable Dashboard

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



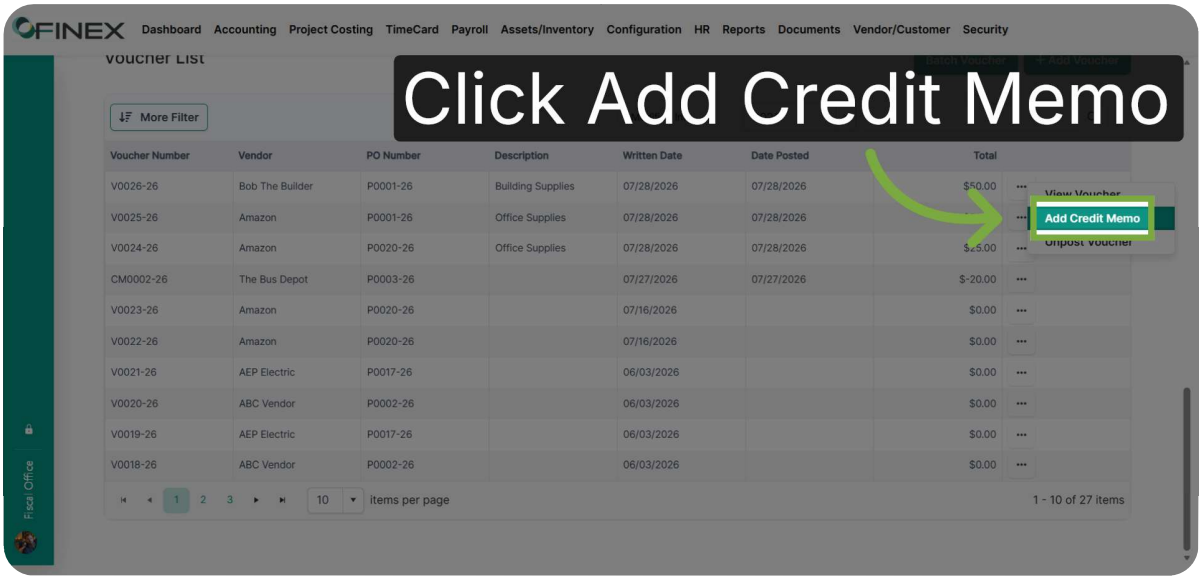
04 Access Voucher Options

Click the ellipsis to access the Voucher options menu on a Voucher that has already been posted.



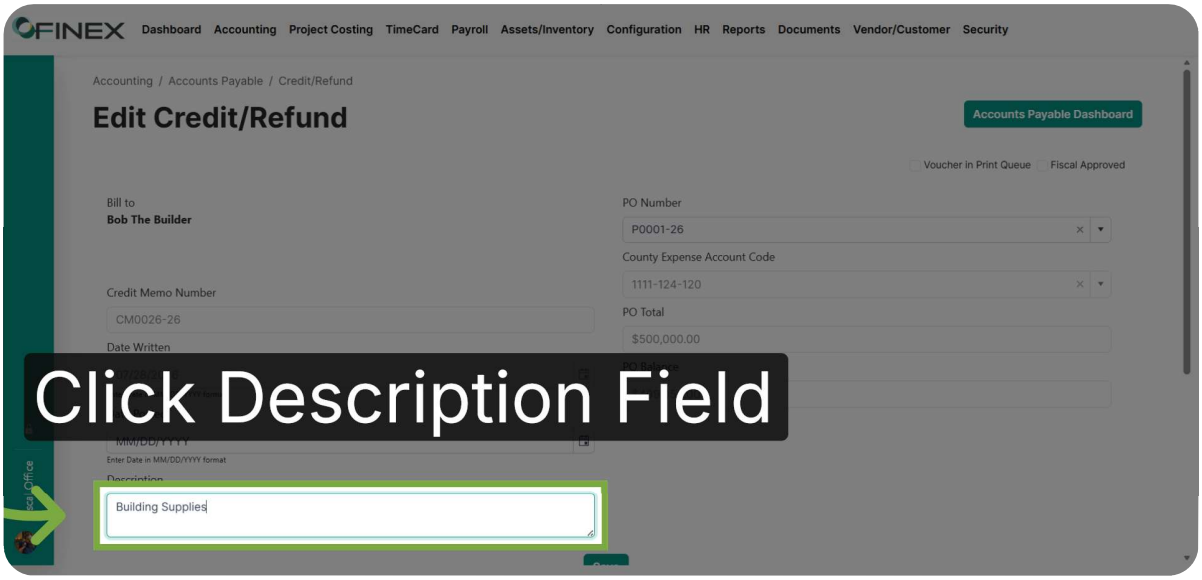
05 Select Add Credit Memo

Click Add Credit Memo to start creating a new Credit Memo.



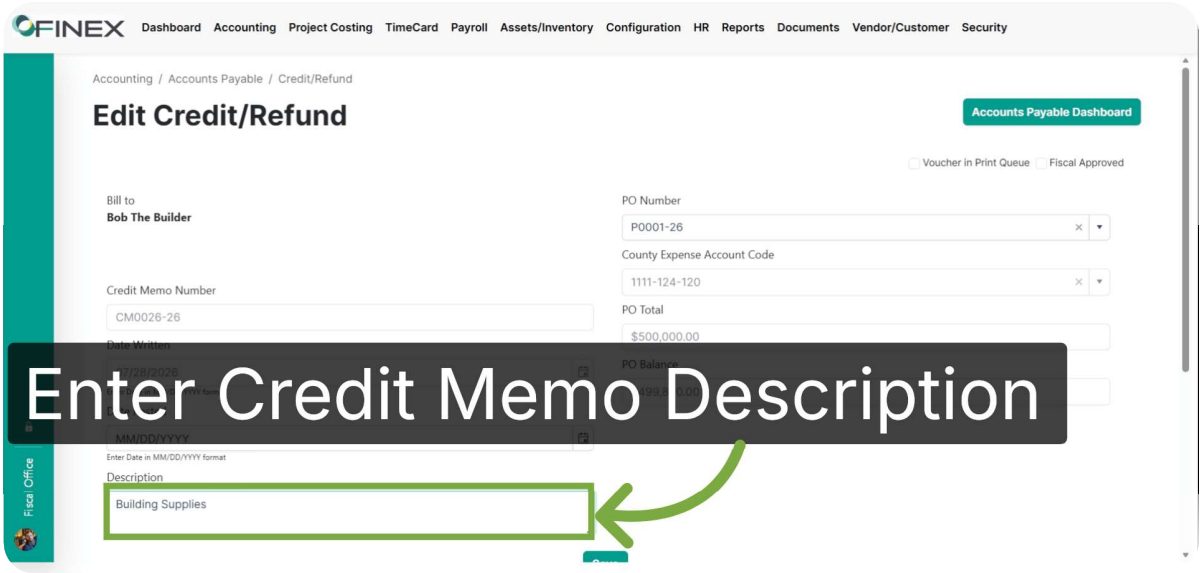
06 Select Description Field

Click the Description Field.



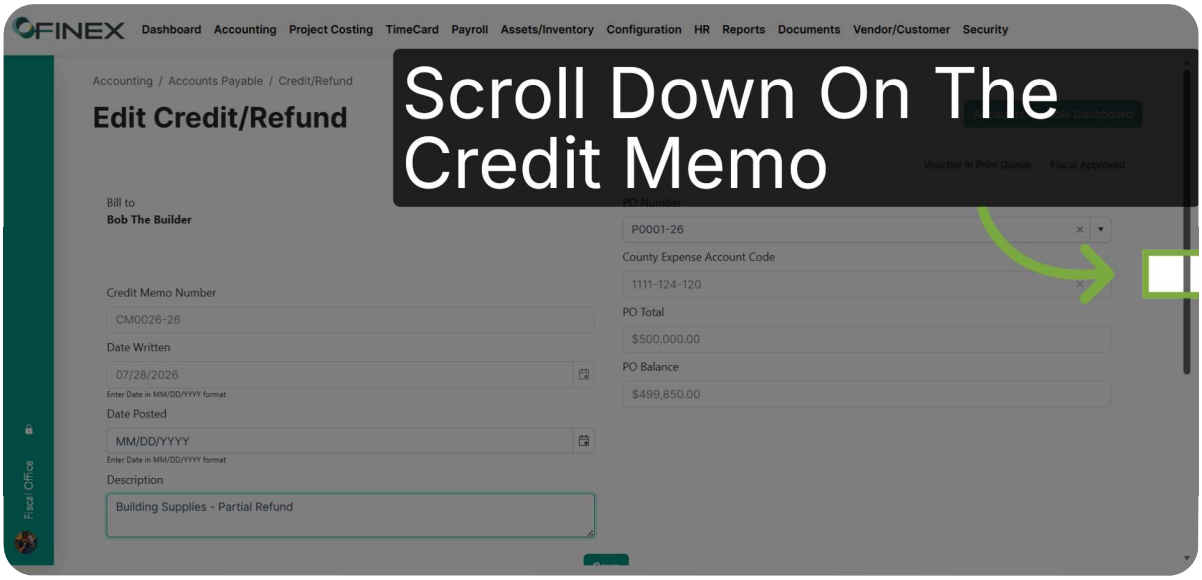
07 Enter Credit Memo Description

Enter the description for your Credit Memo.



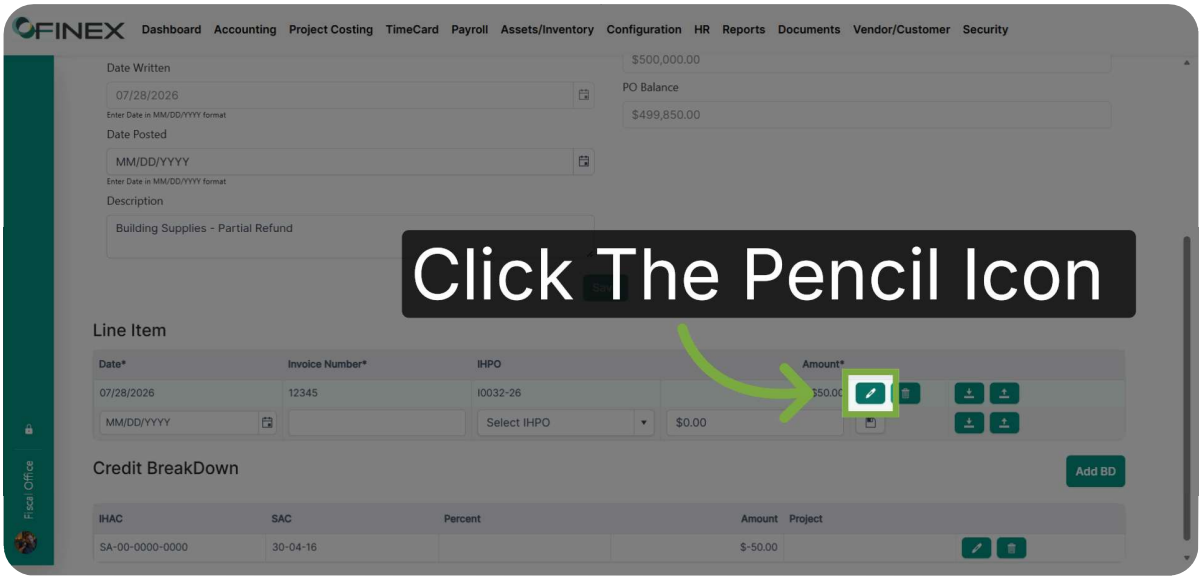
08 Scroll Down On The Credit Memo

Scroll down on the Credit Memo to access the line item.



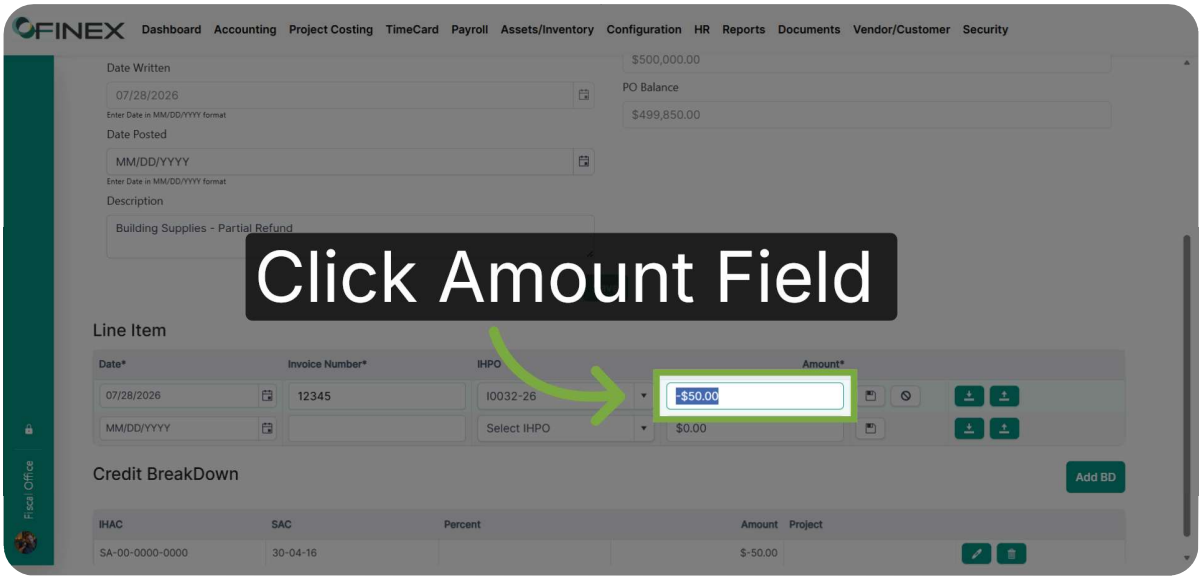
09 Select The Pencil Icon

Click the Pencil Icon to edit the line item for your Credit Memo.



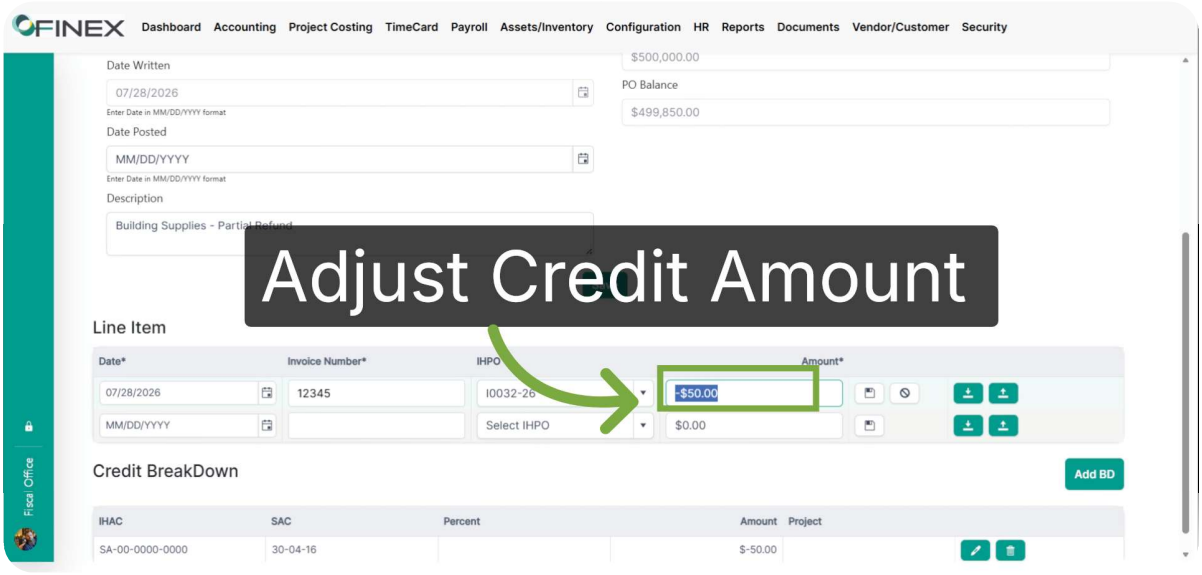
10 Select Amount Field

Select the Amount Field.



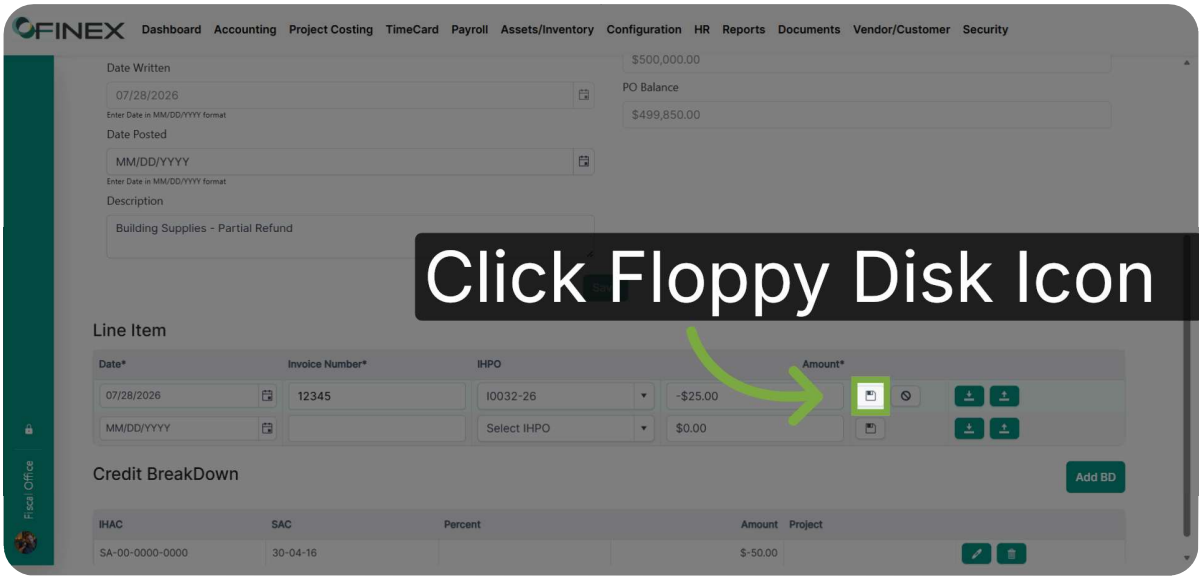
11 Adjust Credit Amount

Adjust the amount written on the Credit Memo to reflect a change if it is not the whole amount being returned.



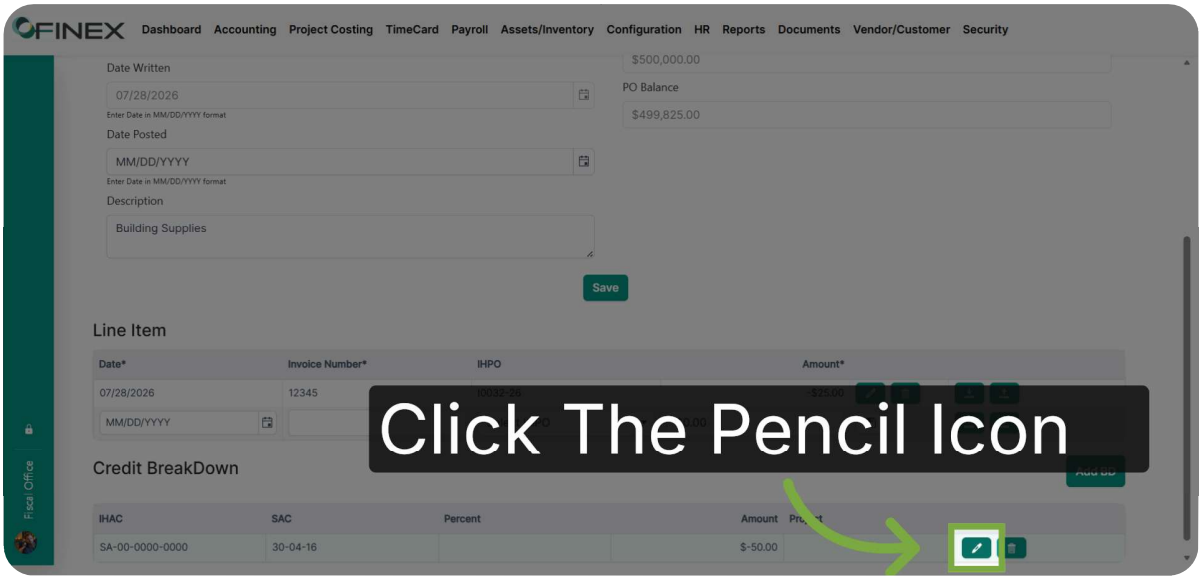
12 Select Floppy Disk Icon To Save

Click the Floppy Disk Icon to save your line item.



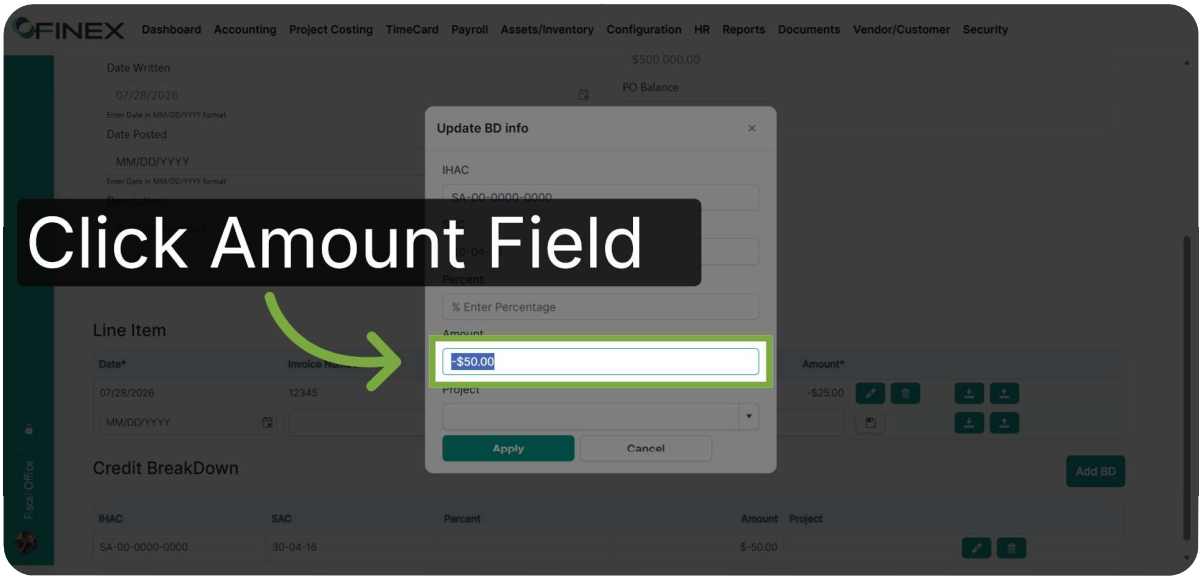
13 Select The Pencil Icon

Click the Pencil Icon to edit your Credit Memo breakdown.



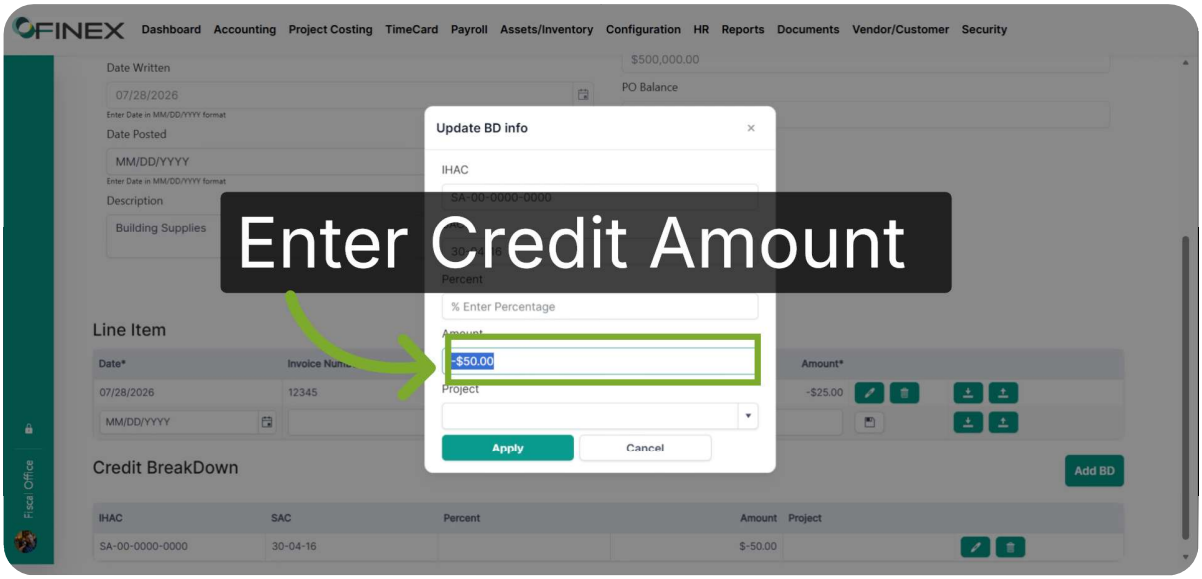
14 Select Amount Field

Click the Amount Field.



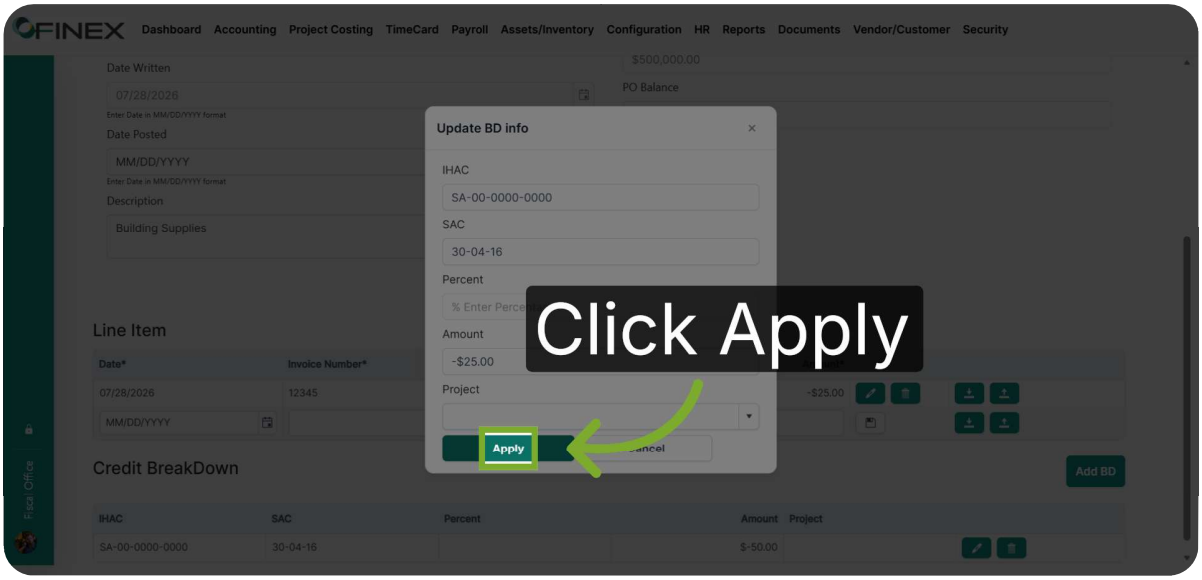
15 Enter Credit Amount

Enter the Credit Amount to match what is written in your line item.



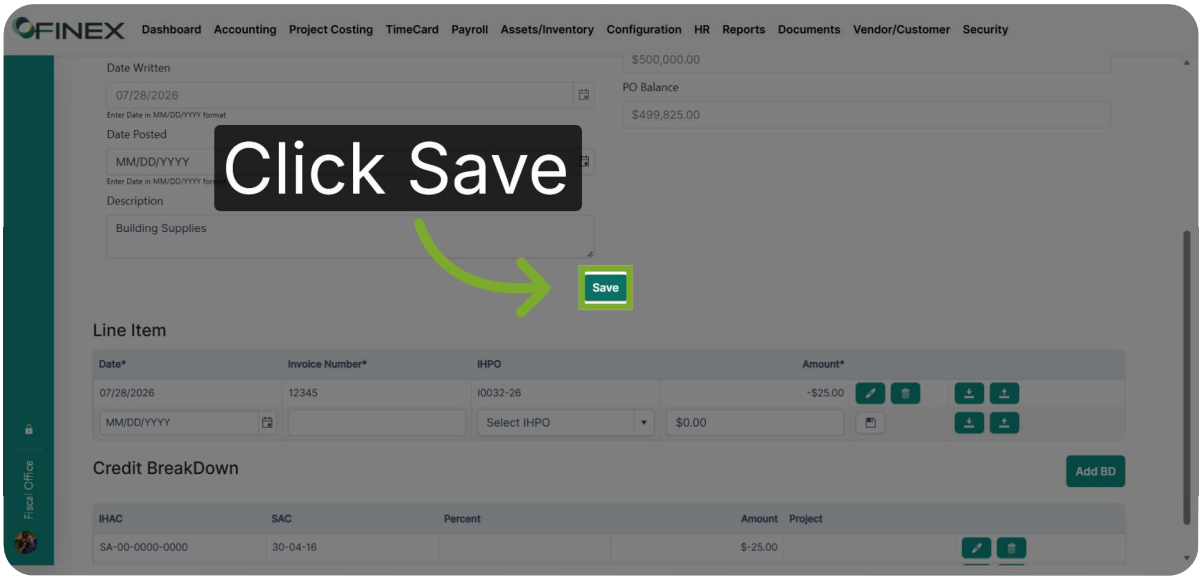
16 Select Apply

Click Apply to save your changes.



17 Save Credit Memo

Click Save to complete your Credit Memo.



You have now successfully completed a Credit Memo in Finex. You can view your completed Credit Memo by navigating back to the Account Payable Dashboard and viewing the Credit Memo listed right above the Voucher it is connected to.

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