## Invoicing - Creating and Applying Credit Memos

Effectively managing accounts receivable is essential for maintaining accurate financial records. Credit memos help adjust or correct invoices as needed. This job aid provides step-by-step instructions on how to create and apply a credit memo in Aspire.

## Steps to Create and Apply a Credit Memo:

- 1. Access the Credit Memo Menu and Select "New Credit Memo"
  - Log in to your Aspire account.
  - Select "New Credit Memo" from the menu.



- 2. Select the Payment Account by Entering the Company Name and Apply
  - Enter the company name associated with the credit memo.
  - Click Apply to confirm the selection.

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- 3. Enter Billing Information
  - Enter the billing contact, branch, and billing state to ensure accurate processing.

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## 4. Enter Credit Details

• Add the credit amount, division, sale amount, and taxable amount accurately to reflect the proper credit adjustments.

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- 5. Save the Credit Memo
  - Click Save to finalize and record the credit memo in the system.

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Utilizing credit memos in Aspire enables precise invoice adjustments, ensuring accurate financial tracking. Following these steps streamlines the process for managing credits efficiently.