

# AR History - Option to Email Credit Memo Available (14782) [Enhancement]

Last Modified on 02/20/2023 3:08 pm EST

Email has been added to the right click options for Credit Memos. Notification Template setup is recommended but not required to use this feature.

- If no template is created, the Credit Memo will be attached to the email with a basic subject and the user who sent the memo will display as the 'Sent From'.
- If a template is created, subject and body content is populated with what was created in the template and 'Sent From' will populate with the Division's email. If an email does not exist it will use the sender's email address.
  - Templates are created in *Setup > System > Notification Template* - select 'Credit Memo' from Type drop down

AR HISTORY												
CURRENT		1-30 DAYS		31-60 DAYS		61-90 DAYS		91-120 DAYS		120+ DAYS		TOTAL
93.58		0.00		0.00		0.00		0.00		0.00		93.58
<input type="checkbox"/> Limit to open items   STATEMENT   INVOICE   AUTO APPLY   BALANCE WRITE OFF   PAYMENT METHODS (0)										<input type="text" value="Search"/>		
DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE	RUNNING SUM			
02/20/23		2023-02		Credit Memo - Adjustment	845933	(50.00)	50.00		201.84			
02/15/23		2023-02		Credit Memo - Adjustment	845932		25.00		251.84			
02/02/23	02/22/23	2023-02		Invoice	845933		(50.00)	58.26	276.84			
02/02/23	02/22/23	2023-02		Invoice	845932		(100.00)	35.32	168.58			
02/02/23		2023-02		Credit Memo - Adjustment	845932	(100.00)	100.00		33.26			
01/06/23	01/26/23	2023-01		Invoice	845936	108.26	(108.26)		133.26			
11/14/22	12/04/22	2022-11		Invoice	845937	25.00	(25.00)		25.00			
11/11/22		2022-11		Payment - Check	6123	(1,399.99)	1,399.99		0.00			

Pathway: Accounts > Account (Customer Service Screen) > AR History