

**Credit Memo**

Roles: Financial Manager, Financial Manager Assistant  
 Project Status: Design, Construction, Substantial Completion, Punchlist, Warranty

<b>Step</b>	<b>Task</b>
1.	Click the drop-down next to <i>Go To...</i> and select <b>Project Contracts</b> .
2.	Identify the contract against which the payment will be charged.
3.	Select the <b>Payments/Credits</b> link.
4.	Scroll down to the bottom of the screen and click the <b>Enter New Credit</b> command button.
5.	Enter information in all fields to complete the credit memo: <ul style="list-style-type: none"> <li>• Description</li> <li>• Invoice No.</li> <li>• Credit Date</li> <li>• Amount</li> </ul>
6.	Click the <b>Submit</b> command button.
7.	Click the <b>Confirm</b> command button.