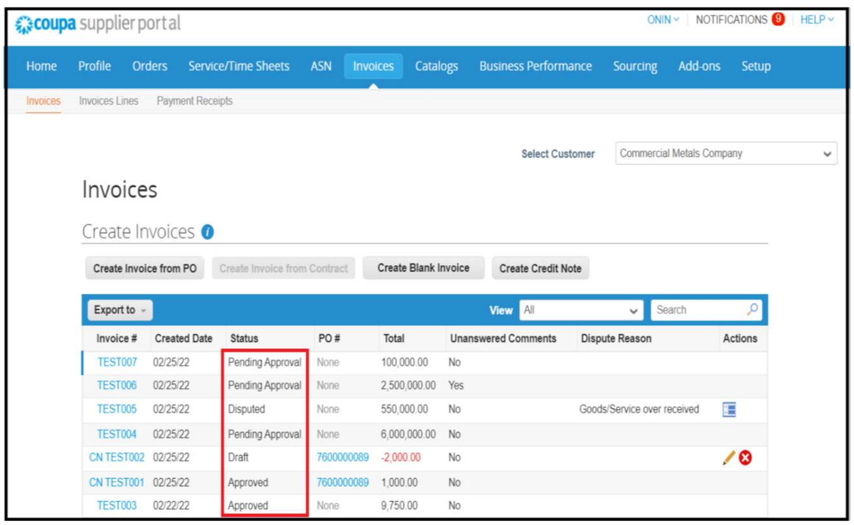
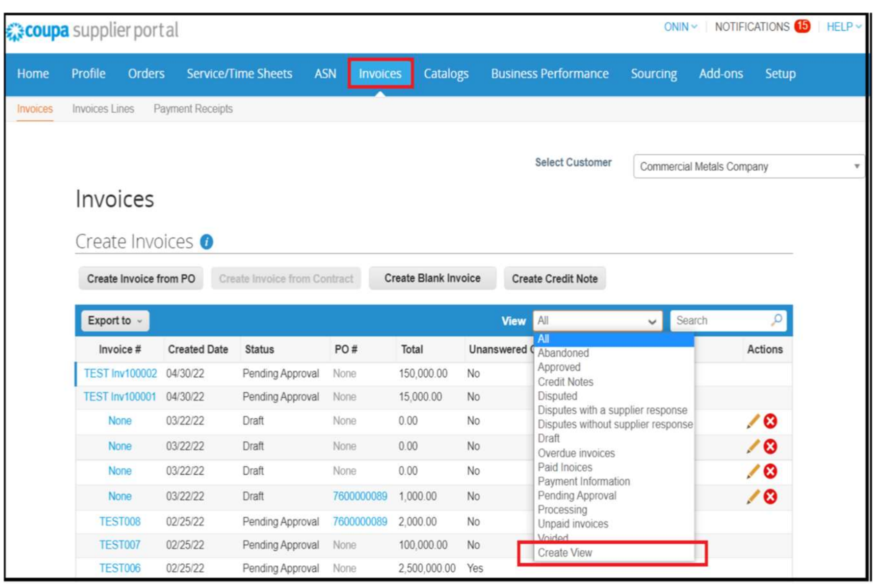
Quick Reference Guide – Checking Credit Status

How To Check Credit Status

1. **To view all credits**
    a. Click Invoices Tab
        i. Status of each invoice/credit is displayed.
    b. The view can also be changed to view credits only
        i. Click the View dropdown menu
        ii. Select Credit Notes



2. **Create a View to see paid status.**
    a. Click Create View on the View dropdown.



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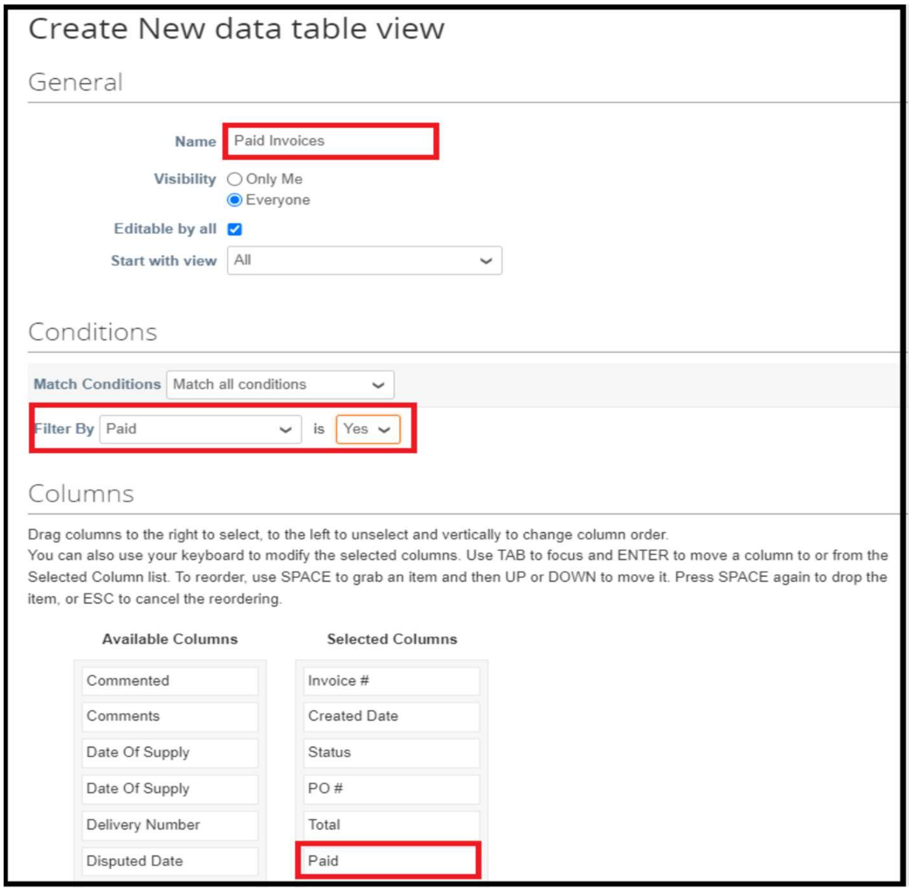
b. Enter the name of the report.

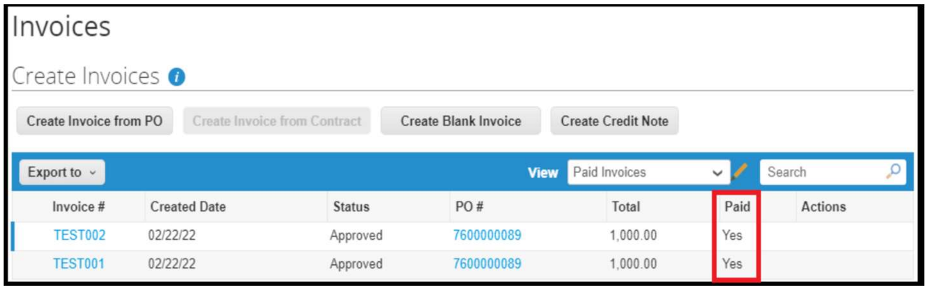
c. Add condition: Paid = Yes

d. Drag the information that you need in your report.

i. Then, click Save



e. Paid credits and invoices are displayed.



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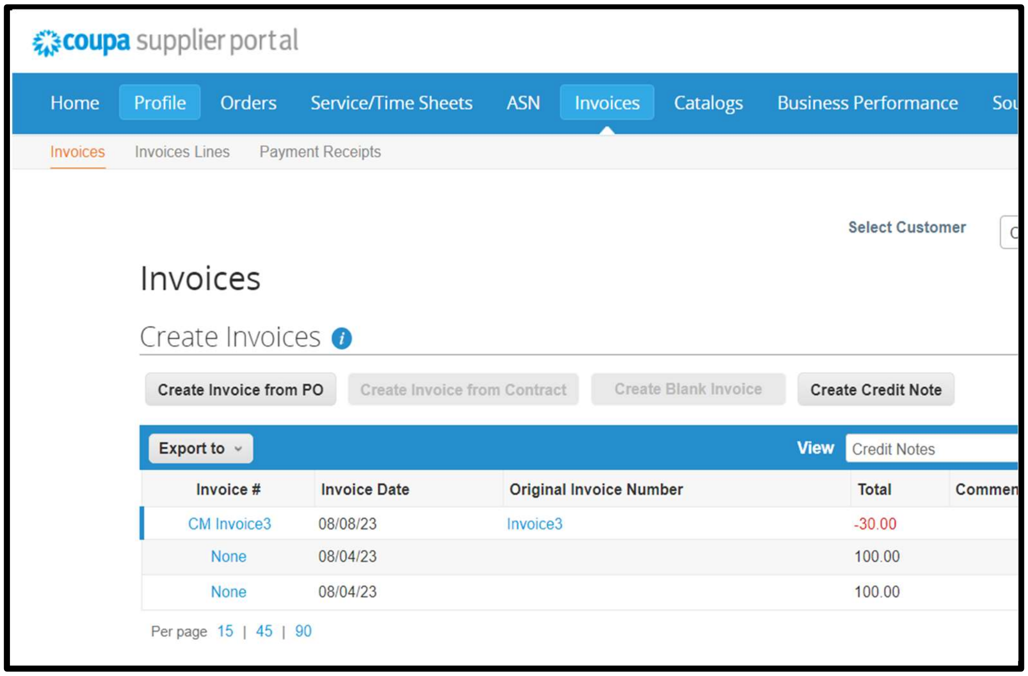
3. To check Credit Status detail

a. Click on the credit under Invoice #.



b. Scroll to the Payment section of the Credit Memo

c. Click drop down arrow.