Polaris Acquisitions

# How to Create a Credit Memo

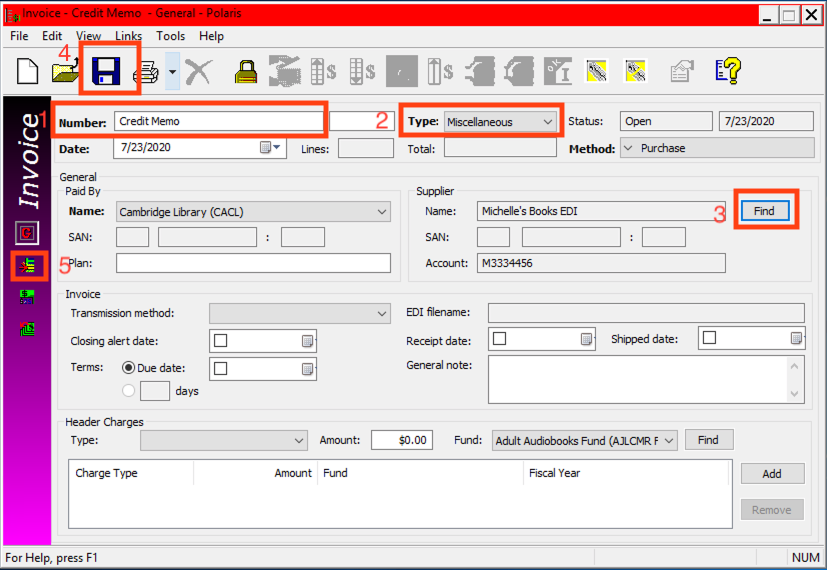
## Introduction

This article explains how to credit a specific fund(s) without linking to an invoice line item.

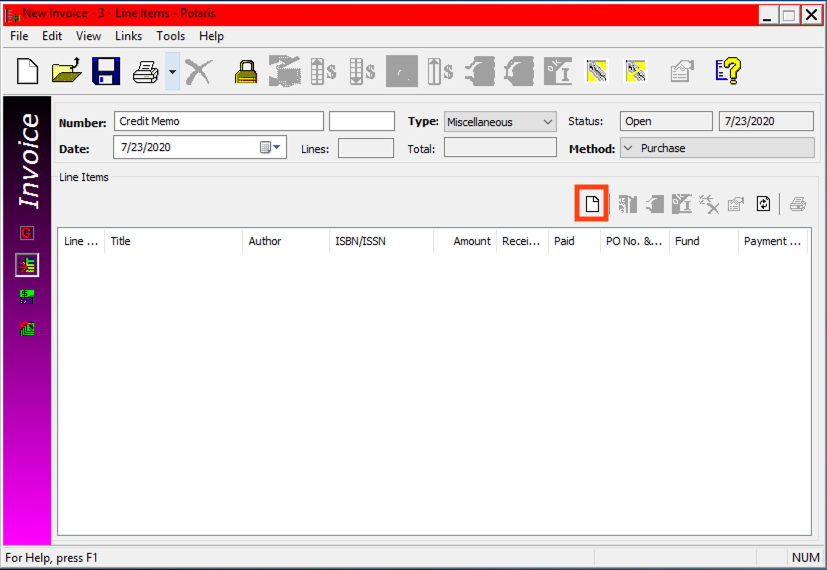
## New Invoice:

Use the Polaris Toolbar, File>New and Choose Invoice

1. Name the invoice according to your library guidelines
2. Choose **TYPE:** Miscellaneous
3. Link to the correct Supplier record
4. Click the Save button
5. Navigate to the 2nd view of the Invoice

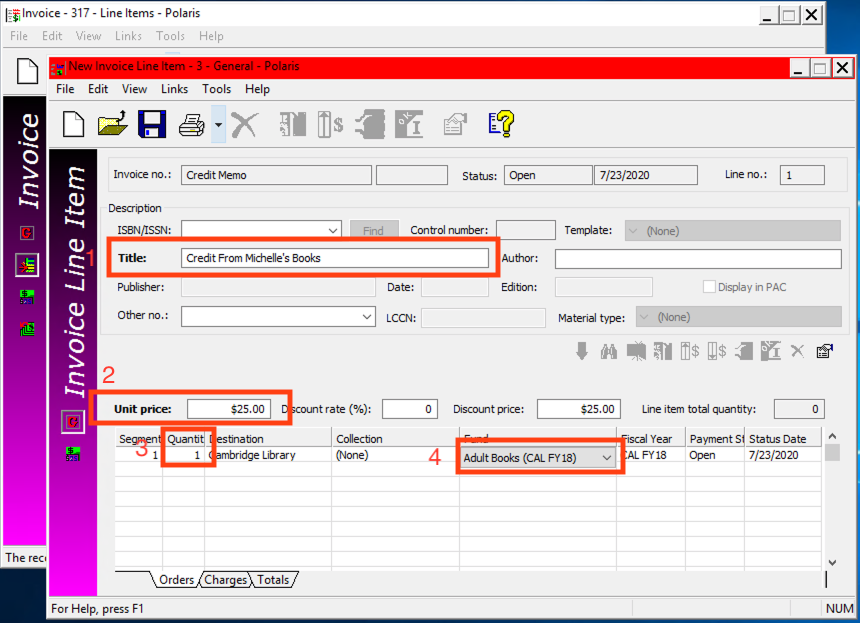


On the 2nd view of the Invoice, use the Mini Toolbar to add a new line to the invoice:

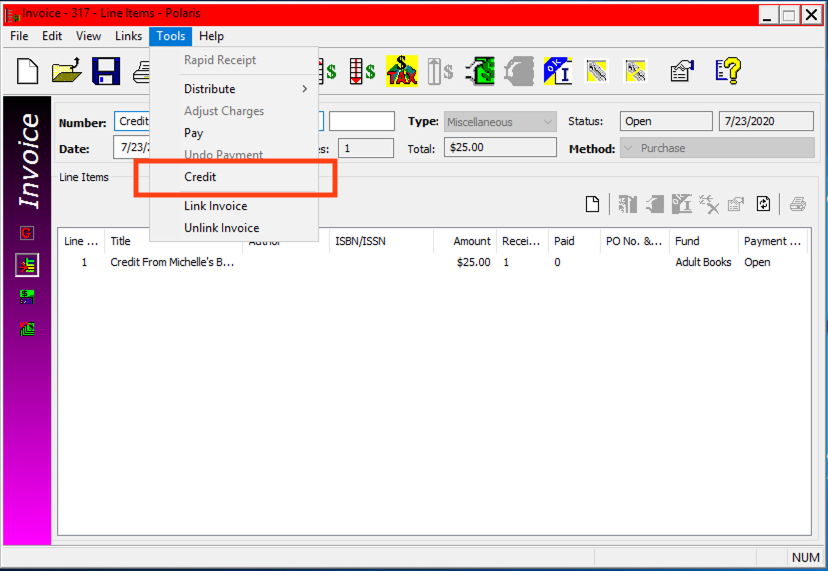


This will open a new Invoice Line Item:

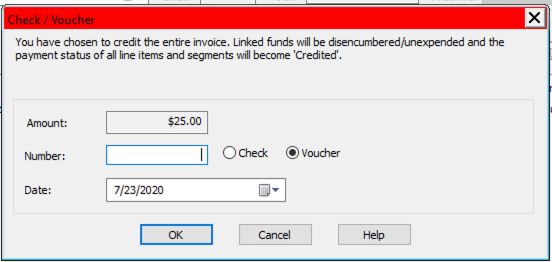
1. Title: Choose whatever makes sense in your workflow/library
2. Unit price: The amount that you are wanting to credit
3. Quantity: Change from 0 to 1
4. Choose the correct fund to credit
5. Hit save and close the invoice line.



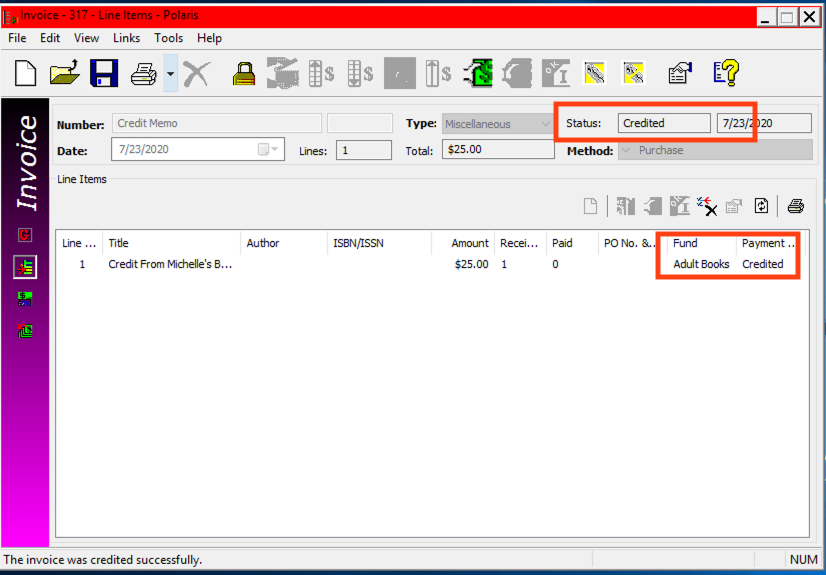
Back on the invoice, navigate to the Tools drop down menu, and choose Credit:

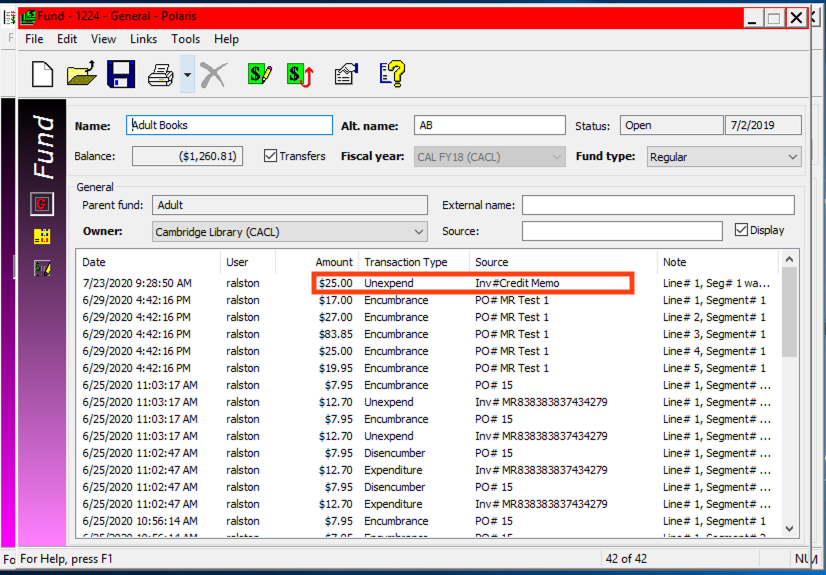


Click OK when the box pops up:



The invoice line will have a status of Credited (as does the line):



This will unexpend the amount in the fund

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