

Create a Credit Order

You may need to match a credit transaction to a separate credit order. Simply select the *Credit Order* checkbox to create a credit order in the amount of the credit transaction. Next, match the credit transaction to the new credit order. Use this quick reference as a reminder of the basic steps for creating a credit order.

Order Information

General

Order Number: * 0001050920 Order Date: []

Order Status: Open Order Use: []

Financials

Credit Order

Order Amount: * [0] Freight Amt: []

Order Tax: [0] Line Items: []

Merchant

--Merchant Favorites-- [Select]

1. When you create an order, select the *Credit Order* checkbox, then complete and save the credit order.

Order List
Click on the Order Number to view the order details. Click on the Receipt Status to manage the orders Receipts.

Records 1 - 1 of 1

Select	Order Date	Order Number	Merchant	Order Amt	# of
<input type="checkbox"/>	08/09/2007	0001050920	Copyworks	\$500.00	CR

Order # not unique

Records 1 - 1 of 1

[Receive Outstanding Qty](#) [Undo Receipt of Entire Order\(s\)](#)

[Create a New Order by Copying an Existing Order](#)

On the order list, the credit order displays with a **CR** designation.

Receipt Status	Order Status	% Fulfilled	Last Match	Re
Not Received	Open	0.00%		

The *Order Status* and *Percent Fulfilled* fields also display with the correct information on the order list.

Order Number: 0001050920 Order Date: 08/09/2007 Order Status: Open
 Order Amount: 500.00 CR Tax Amount: 0.00 Freight Amount: 0.00
 Merchant: Copyworks Usage Code: Order Source: satrain2
 Billed Amount: 0.00 Variance %: 100.00% % Fulfilled: 0.00%
 Trans. Matched: 0 Last Match: Receipt Status: Not Received

Order # not unique

Order Details | Matched Transactions | Receiving

The Matched Transactions tab provides information on the results of a match, including the list of transactions associated to the order.

Order-Transaction Match Summary [Match to Transactions](#)

This order is currently not matched to any transactions. To match it to transaction(s), click the "Match to Transactions" link.

Order Amount: 500.00 CR Billed Amount: 0.00 Variance Amount: 500.00
 % Fulfilled: 0.00% # of Transactions Matched: 0 Variance Percent: 100.00%

The **CR** designation and correct *Order Status* and *Percent Fulfilled* information also display on the order detail screens, including the *Matched Transactions* tab.

➤ *Learn More:* For more detailed information, refer to the *Order Management* web-based training lesson and user guide available at:

<https://wbt.access.usbank.com>

Contact your Program Administrator for the most current passwords.

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