


# How do I issue a customer credit?

## About issuing customer credit

Use a credit form to record returned items or canceled orders for which you've already sent an invoice and received a payment.

1. [Open the account](#) that you use to track this customer's payments and invoices.
2. Click  (the Account Actions icon), and then choose **New Credit**.
3. In the **Credit** form, fill out the **Customer information** area at the top of the form, including customer name, project/job, and business tag.
4. Fill out the item information for the charge that is being credited.
5. If you want to preview the credit form, click **Print**. Then click **Preview**.  
You can close the preview, return to the form, and then make changes if necessary.
6. If you want to print the **Credit form**, click **Print**. Then click **Enter**.
7. At this point, you can either [email](#) the credit to your customer, or mail it. (Optional)
8. Click **Enter** to record the transaction. Quicken enters the credit in the invoices/receivables register.  
When you create a new estimate, invoice, or credit, Quicken displays the last layout you used for that transaction type. If you want to use a different layout, select the one you want from the Layout list. Use the [Forms Designer](#) to customize your business forms.

## Notes

You can create and customize a credit form just as you do an invoice.

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This feature requires **Quicken Business & Personal**. Learn how you can [upgrade Quicken](#) in minutes.