

Credit Memos

04/09/2025 12:47 pm CDT

Overview

When purchased products are returned to their vendor, a **Credit Memo** should be generated to document the process and log the corresponding credited amount. This procedure ensures that your inventory levels and accounting records remain accurate and up to date. Within the Skustack Admin portal, you can easily create, manage, and export Credit Memos. The Skustack application, on the other hand, allows you to effectively pick all products associated with a Credit Memo.

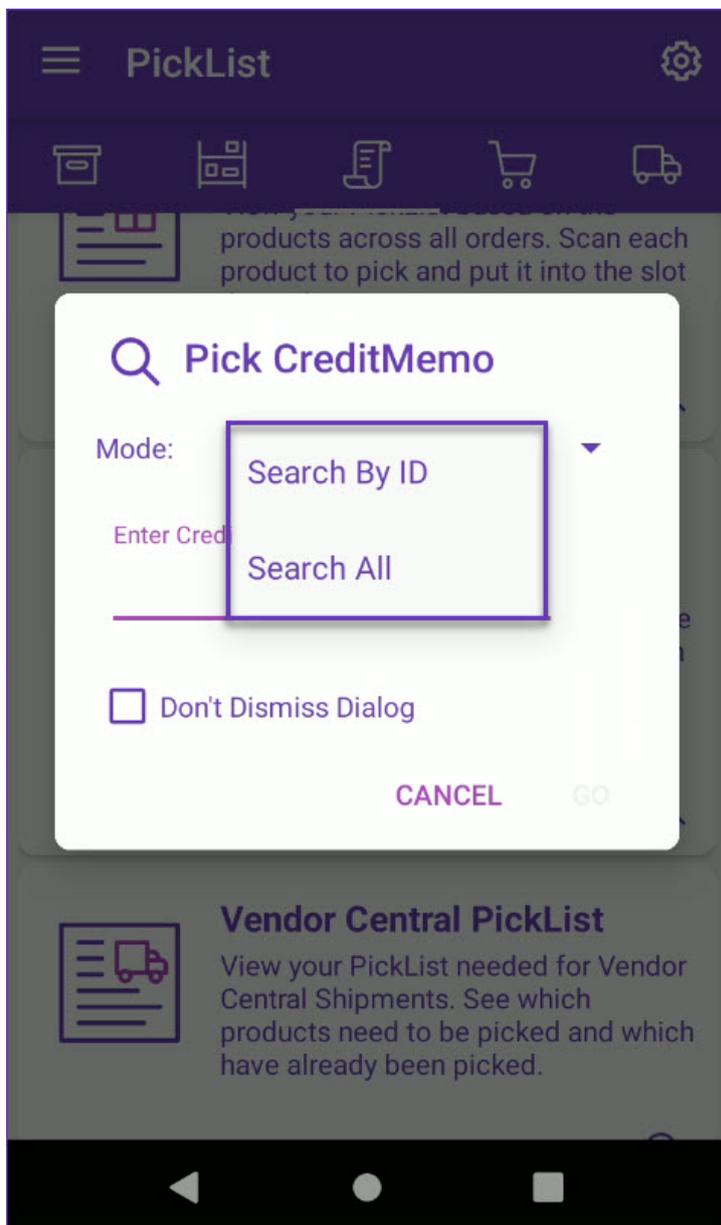
Credit Memo Module

The **Credit Memo** module is located within Skustack's **PickList** tab. Within this module, you can view and manage Credit Memo picklists with products that should be sent back to their Vendor.

Search Credit Memos

You can search for Credit Memos in one of two modes:

- **Search By ID** – Search for a specific **Credit Memo #**.
- **Search All** – Search for all Credit Memos and/or filter by a specific product.



Pick Credit Memos

To pick **Credit Memo** products:

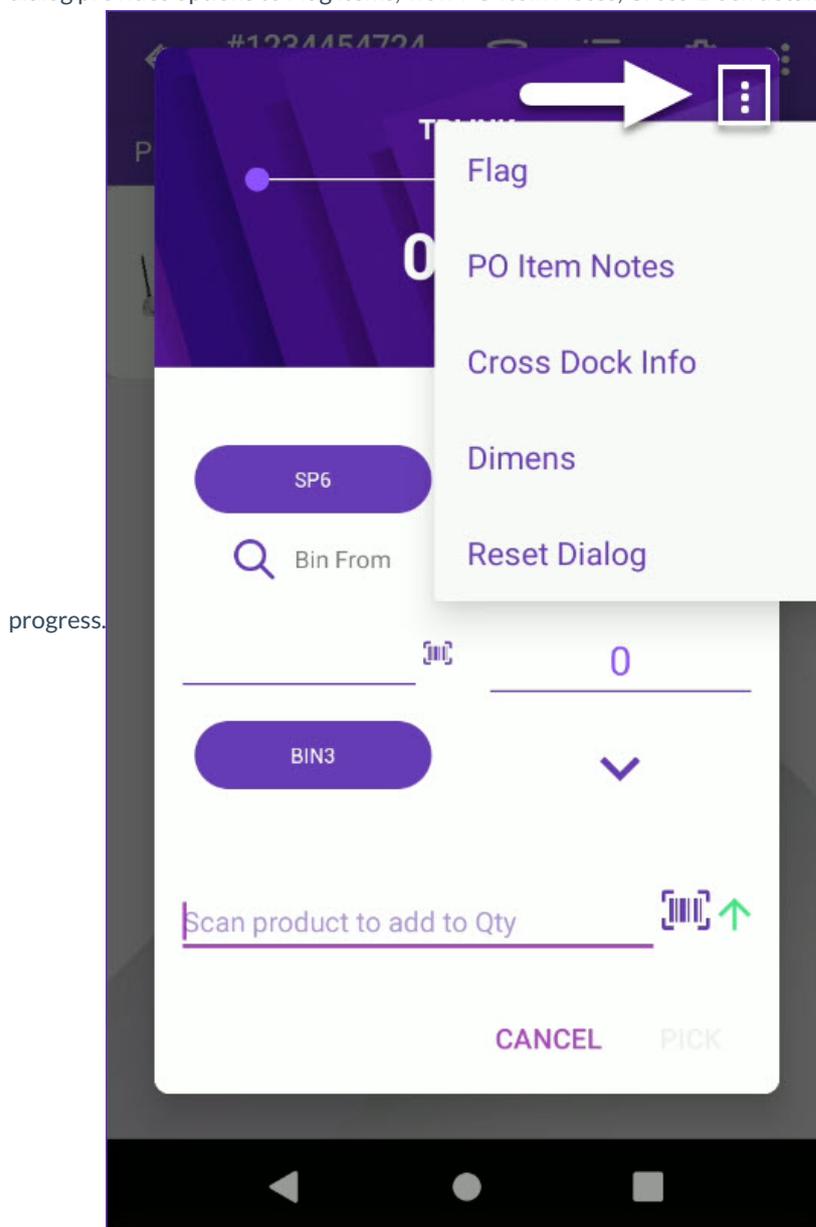
1. Navigate to the **Picklist** tab and select the **Credit Memo** module.
2. Tap the **Search** icon and scan/enter the desired **Credit Memo**.
3. The picklist with product quantities will load. You can also filter items by their **Picked** status or **Warehouse Region**. Simply tap the [filter icon](#) at the top right and apply your [preferences](#).
4. Tap the [Notes icon](#) to view or add custom Notes to the **Credit Memo**.
5. Swipe down to see the number of picked units and the number of total units in this memo.
6. Swipe the items to the left to reveal shortcuts to other actions:
 - **Bins** – Tap to see all bins where the product is stored (bins will show if you're logged into a bin-enabled warehouse).

- **Info** – This shortcut reveals the [product info](#) module.
- **Dimens** – Allows you to set [product dimensions](#) or get a [4D scale](#) reading.
- **Labels** – Tap to [print](#) product labels for each item.

7. Tap the [three dots menu](#) in the upper right-hand corner to **Select Product Identifiers**:

- **UPC**
- **Aliases**
- **Product Name**

8. Scan a Product ID/UPC barcode, or tap it on the screen. The product window will open. The action menu within the dialog provides options to Flag items, view PO Item Notes, Cross-Dock details, Dimensions and to Reset the picking



9. Enter the bin from which you are picking. A suggested bin may appear next to the Bin field. This suggestion is based on the following factors:

- a. The bin is sellable.
 - b. The bin type is Normal or Temp.
 - c. Primary bins will always be suggested first.
 - d. The bin with the most or least quantity will be suggested based on the client setting **PickList Bin suggestion sort qty by ASC Order**.
10. Scan units to add to the picked qty or adjust the number manually. To auto-populate the total quantity available for the scanned product in that bin, enable Skustack's [Warehouse Management setting Auto populate progress quantity when bin is selected](#).
 11. If the [Lot Number](#) workflow is enabled for your company and the product is set as expirable you must select a Lot Number before being able to pick it.
 12. Tap **Pick** to update the picked quantity.
To switch between positive and negative movements for [serialized](#) products, tap on the green arrow. Note that the arrow indicator must be red in order to unpick products with serial numbers.
 13. The quantity picked will be transferred to the Picking Bin and recorded on the Credit Memo.
 14. When all items in the credit memo are picked, a success message will display at the top.

Related Settings

SETTING	DESCRIPTION
Validate serial globally	Client Setting . Enables serial number validation in Skustack. Learn more about serial number validation and relevant client settings here .
Require serial scan when picking	Skustack's Warehouse Management setting . When enabled, will force the user to scan serials for products that are set to require serial scan.
Auto populate progress quantity when bin is selected	Skustack's Warehouse Management setting . When a bin is selected, the Pick Qty field will automatically be set to the total quantity available in that bin, up to the quantity required.

Manage Credit Memos

Skustack enables you to efficiently search and manage existing Credit Memos, monitor their progress, create new memos, and more.

Search Credit Memos

To search for existing Credit Memos:

1. Navigate to the Skustack Admin portal at <https://xx.skustack.com> (replace "xx" with your **server ID** or **team name**).
2. Enter your login credentials.
3. Go to **Purchasing > Manage POs**.

4. Click the **PO Type** filter and select **Credit Memo**. Configure the rest of the **Default filters** to make sure that the results display exactly what you need. The available filters are:

- a. **Keyword**
- b. **PO IDs**
- c. **Company**
- d. **Statuses**
- e. **PO Type**
- f. **Receiving Statuses**
- g. **Approval Status**
- h. **Vendor**
- i. **SKU**

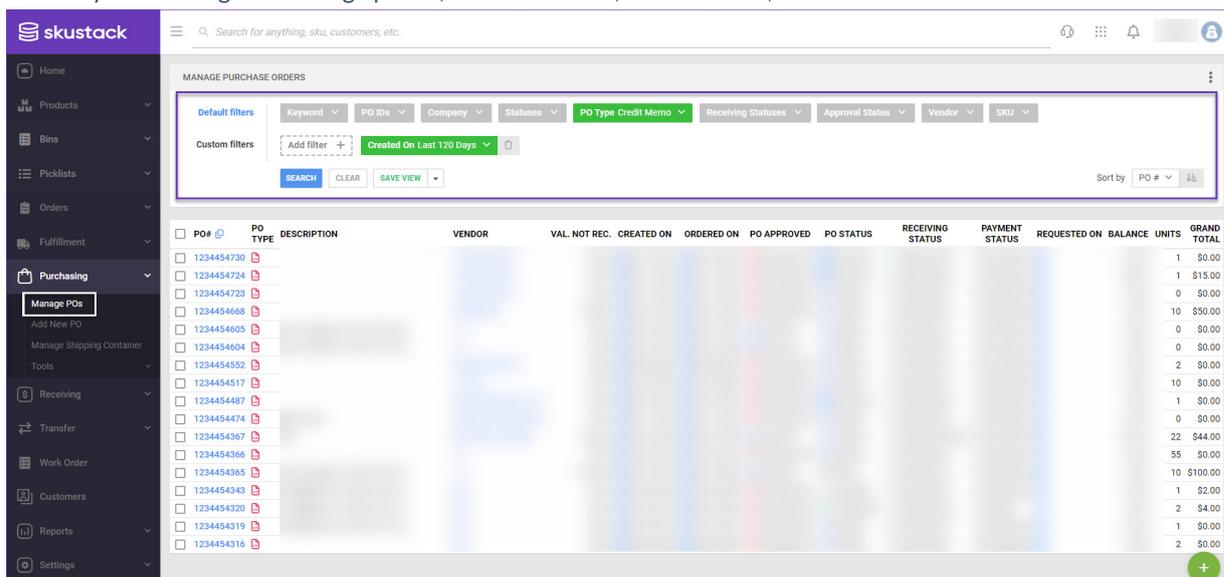
5. Click **Search**. Each filter you apply gets highlighted. If a filter is gray or not displayed at all, it's not active.

6. To manage the columns in the grid, click the three dots icon on the top right and select **Customize Columns**. You can:

- a. Reorder columns by dragging them up or down in the list;
- b. Hide columns by clicking the **Trash** icons;
- c. Add columns by clicking **Add column**.

7. To arrange the data in a different order, use the **Sort by** menu.

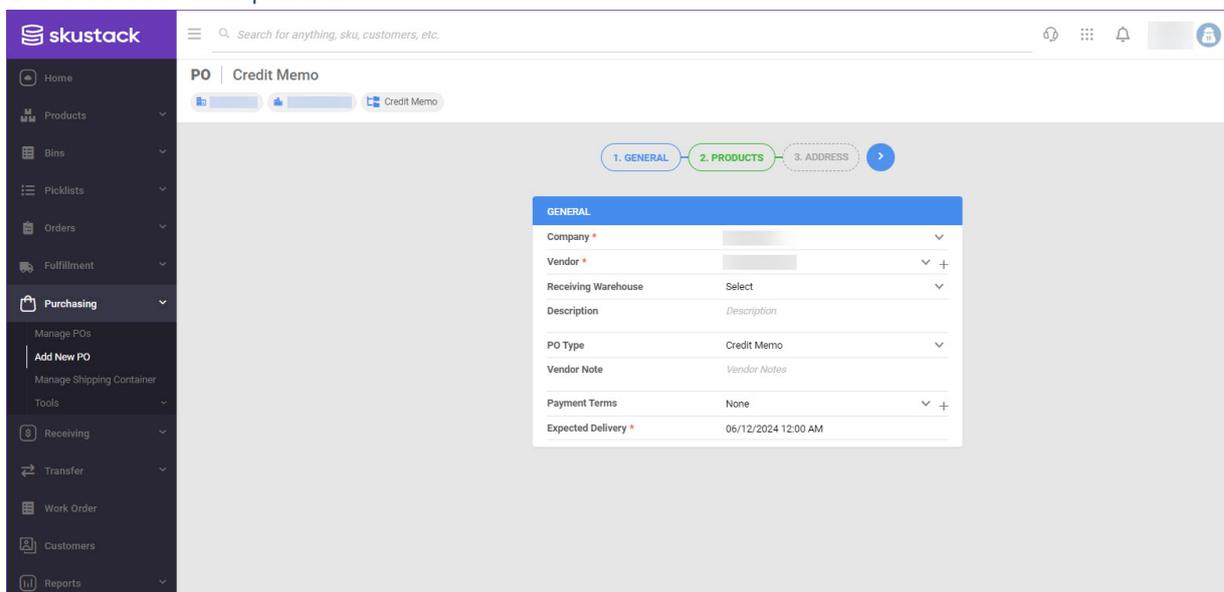
8. To save your filtering and sorting options, click **Save View**, enter a **Name**, and click **Save**.



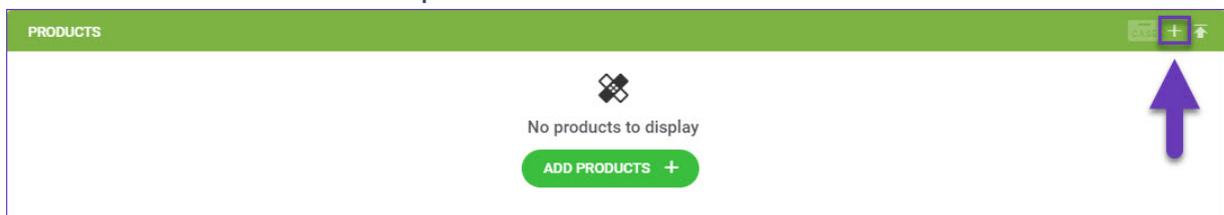
Create Credit Memos

You can create a Credit Memo in a few simple steps:

1. Navigate to **Purchasing > Add New PO**.
2. Select the associated **Company**.
3. Choose the **Vendor** to whom you will be returning the products.
4. If necessary, add:
 - a. Items **Receiving Warehouse**.
 - b. **Description** of the memo.
 - c. Custom **Vendor Note**.
 - d. Add custom **Payment terms**, or select an existing one from the dropdown menu.
5. In the **PO Type** field, select **Credit Memo**.
6. Choose an **Expected Delivery** date and time.
7. Click the blue arrow to proceed.



8. Click the **Add Products +** button or the **plus** icon.



9. In the following pop-up, click the **SKU List Mode** toggle to display a search textbox, in which you can enter a list of SKUs. You can also **Add a filter** to limit your search or **Add a new product**, if necessary.
10. Search and check the desired products to select them.
11. Define return items **Qty** and **Unit Price**.
12. Click **Add Selected**, or **Add & Close**.

Add Products SKU List Mode

Add filter + Add new product

<input type="checkbox"/>	SKU	PRODUCT	PR PRICE	RETAIL PRICE	AVG COST	VENDOR SKU	AVAIL. QTY	ON ORDER	IS KIT PARENT	UNIT PRICE	QTY
<input checked="" type="checkbox"/>			\$0	\$0	\$31.887		2	0		\$0.000	01

Displaying results 1-1 of 1

CANCEL ADD SELECTED ADD & CLOSE (1)

13. Alternatively, you can also upload products in bulk with an import file. Simply download a template in the chosen format (Tab Delimited, Excel, or CSV), populate the required products information and [upload the file](#) in Skustack.

1. GENERAL 2. PRODUCTS 3. ADDRESS

PRODUCTS +

SKU	PRODUCT NAME	VENDOR SKU	RETAIL PRICE	SITE COST	UNIT PRICE	DISCOUNT	AVAIL. QTY	TOTAL UNITS	WAREHOUSE	LINE TOTAL
			\$0.000	\$0.000	\$31.887	\$0.00	2	1	Select	\$31.887

14. You also have the option to [Enable Case Qty](#) mode and define **Total Cases, Qty/Case** and **Case Price**.

1. GENERAL 2. PRODUCTS 3. ADDRESS

PRODUCTS +

SKU	PRODUCT NAME	VENDOR SKU	RETAIL PRICE	SITE COST	UNIT PRICE	DISCOUNT	AVAIL. QTY	TOTAL UNITS	WAREHOUSE	TOTAL CASES	QTY/CASE*	CASE PRICE	LINE TOTAL
			\$0.000	\$0.000	\$0.000	\$0.00	2	1	Select	1	1	\$0.000	\$0.000

15. Select a **Warehouse** from which the products will be subtracted.

16. Once done with the products details, click the blue arrow to proceed.

17. Provide a **Billing Address** and **Ship To** information and click the green flag to save the **Credit Memo**.

1. GENERAL 2. PRODUCTS 3. ADDRESS

BILLING ADDRESS

Saved Addresses Select

First Name *First Name*

Middle Name *Middle Name*

Last Name *Last Name*

Business *Business Name*

Country United States

Address *Address Line 1*

Address Line 2 (Optional)

ZIP Code *ZIP Code*

City *City*

State Select

Phone *Phone number*

Fax *Fax number XXX - XXX - XXXX*

SHIP TO

Saved Addresses Select

First Name *First Name*

Middle Name *Middle Name*

Last Name *Last Name*

Business *Business Name*

Country United States

Address *Address Line 1*

Address Line 2 (Optional)

ZIP Code *ZIP Code*

City *City*

State Select

Phone *Phone number*

Fax *Fax number XXX - XXX - XXXX*

18. A message with the **Credit Memo ID** appears on your screen. Click **View Credit Memo** to display its details.

Credit Memo | #1234454730 | Thirsty Tea | Truecommerce

Ordered | Normal | None | Not Received | Not Invoiced | Total products: 1 | Total units: 1 | Case Qty Enabled

Notes (3) | Actions

GENERAL

Company: [Redacted]
 Vendor: Truecommerce
 Description: [Redacted]
 Ordered On: 06/12/2024 11:59 AM
 Requested On: [Redacted]
 Order Type: Default
 ShipFrom Warehouse: [Redacted]
 Expected Delivery: 06/12/2024 12:00 AM
 Cancel By Date: [Redacted]
 Currency: USD
 Instructions: Invoice instructions...
 Total Weight: 0.00 lbs

STATUSES

Status: Ordered
 Priority: Normal
 Shipping Status: None
 Receiving Status: Not Received
 Invoiced Status: Not Invoiced
 Released For Receiving
 Picking Status: Not Picked

BILLING & PAYMENTS

Payment Terms: None
 Memo: Invoice memo...
 Over Received: \$0.000

CHANGES

Created By: [Redacted]
 Created On: 06/12/2024 11:59 AM

ITEMS SUMMARY

SKU	VENDOR SKU	PRODUCT NAME	ORDERED	CASE QTY	RECEIVED	WAREHOUSE	CASES RECEIVED	UNIT PRICE	CASE PRICE	LINE TOTAL
TPLINK_Defective		TPLINK_Defective	1	1	0		0	\$0.000	\$0.000	0

Displaying results 1-1 of 1

TOTAL

Subtotal: \$0.00
 Discount Total: \$0.00
 Free Shipping
 Shipping Total: \$0.00

RELATED PURCHASE ORDERS

No records to display

Actions

The Credit Memo's **Actions** menu leads to convenient functionalities, such as exporting and printing files with the memo's details, viewing the related products in Manage Inventory, shipping a Credit Memo and creating [Grading Work Orders](#).

Credit Memo | #1234454785 | ABC Vendor

Received | Normal | Fully shipped | Fully Received | Not Invoiced | Total products: 1 | Total units: 1

Actions

GENERAL

Company: [Redacted]
 Vendor: ABC Vendor
 Description: [Redacted]
 Ordered On: 06/20/2024 5:17 PM
 Requested On: [Redacted]
 Order Type: Default
 ShipFrom Warehouse: [Redacted]
 Expected Delivery: 06/26/2024 12:00 AM
 Cancel By Date: [Redacted]
 Currency: USD
 Instructions: Invoice instructions...
 Total PO CBM: 3
 Total Weight: 4.31 lbs

STATUSES

Status: Received
 Priority: Normal
 Shipping Status: Fully shipped
 Receiving Status: Fully Received
 Invoiced Status: Not Invoiced
 Released For Receiving
 Picking Status: Picked

BILLING & PAYMENTS

Payment Terms: None
 Memo: Invoice memo...
 Over Received: \$0.000

CHANGES

Created By: [Redacted]
 Updated By: [Redacted]
 Received By: [Redacted]
 Created On: [Redacted]
 Updated On: 06/21/2024 11:40 AM
 Received On: 06/21/2024 11:40 AM

Search

FAVORITES
 Try starring some Items from the list below.

ACTIONS

- Export
- Export to Excel
- Print to PDF
- View Products in Manage Inventory
- Ship Credit Memo
- Create Grading Work Order

Toolbox

The **Toolbox** grants you access to tabs with other modules related to your Credit Memo. Here you can find the Memo's **Change Log**, **Receiving Sessions**, **Shipping Containers**, related items and their serial numbers.

Credit Memo | #1234454785 | ABC Vendor

Received Normal Fully shipped Fully Received Not Invoiced Total products: 1 Total units: 1

Notes (0) Actions

Home

GENERAL

Company
Vendor: ABC Vendor
Description
Ordered On: 06/20/2024 5:17 PM
Requested On
Order Type: Default
Ship From Warehouse
Expected Delivery: 06/26/2024 12:00 AM
Cancel By Date
Currency: USD
Instructions: Invoice instructions...
Total PO CBM: 3
Total Weight: 4.31 lbs

STATUSES

Status: Received
Priority: Normal
Shipping Status: Fully shipped
Receiving Status: Fully Received
Invoiced Status: Not Invoiced
 Released For Receiving
Picking Status: Picked

BILLING & PAYMENTS

Payment Terms: None
Memo: Invoice memo...
Over Received: \$0.000

CHANGES

Created By
Updated By
Received By
Created On: 06/20/2024 5:17 PM
Updated On: 06/21/2024 11:40 AM
Received On: 06/21/2024 11:40 AM

Search for a tool

- Change Log
- Items
- Receiving
- Serial Numbers
- Shipping Containers

Change Log

The **Change Log** tab provides comprehensive records of all the changes made to the Credit Memo, including the date, time, and the user who made the change.

To see the Credit Memo's change records, navigate to its **Toolbox** and select **Change Log**.

Credit Memo | #1234454787 | ABC Deals

Ordered Normal None Not Received Not Invoiced Total products: 1 Total units: 1

Notes (0) Actions

Home Change Log x

CHANGE LOG

Add filter Property Name Include From Archive SEARCH

LOG ID	LOG TIME	CHANGED BY	APPLICATION	PROPERTY NAME	ORIGINAL VALUE	NEW VALUE	UR
286325	06/20/2024 05:20:21 PM			PurchaseOrderItem_UJC		693536407019	/api/purchaseorder/create/create
286325	06/20/2024 05:20:21 PM			PurchaseOrderItem_CaseQtyOrdered	0	1	/api/PurchaseOrder/Create/Create
286325	06/20/2024 05:20:21 PM			PurchaseOrderItem_ExpectedDeliveryDate	1/1/0001 12:00:00 AM	6/23/2024 5:00:00 PM	/api/PurchaseOrder/Create/Create
286325	06/20/2024 05:20:21 PM			PurchaseOrderItem_DefaultWarehouseID	0	169	/api/PurchaseOrder/Create/Create
286325	06/20/2024 05:20:21 PM			PurchaseOrderItem_QtyPerCase	0	1	/api/PurchaseOrder/Create/Create
286325	06/20/2024 05:20:21 PM			PurchaseOrderItem_PurchaseID	0	1234454787	/api/PurchaseOrder/Create/Create
286325	06/20/2024 05:20:21 PM			PurchaseOrderItem_ID	0	39757	/api/PurchaseOrder/Create/Create

Search for a tool

- Change Log
- Items
- Receiving
- Serial Numbers
- Shipping Containers

Ship Credit Memos

The **Ship Credit Memo** Action allows you to update the status of a Credit Memo to **Fully Received** by its Vendor. It also updates the product's Inventory and PO's Average Cost calculations based on the returned quantity.

When shipping a Credit Memo from a Bin-Enabled Warehouse, its products should be first picked with your Skustack device.

To ship a **Credit Memo**:

1. Navigate to **Purchasing > Manage POs**.
2. Use the available filters to find the appropriate **Credit Memo**.
3. Click the **Actions** menu in the upper right and select **Ship Credit Memo**.

Credit Memo #1234454794 | ABC Vendor

Ordered Normal None Not Received Not Invoiced Total products: 1 Total units: 1

Notes (0) Actions

Search

FAVORITES
Try starring some items from the list below.

ACTIONS

- ☆ Export
- ☆ Export to Excel
- ☆ Print to PDF
- ☆ View Products in Manage Inventory
- ☆ **Ship Credit Memo**
- ☆ Create Grading Work Order

GENERAL

Company: [Redacted]
 Vendor: ABC Vendor
 Description: [Redacted]
 Ordered On: 06/24/2024 5:14 PM
 Requested On: [Redacted]
 Order Type: Default
 Ship From Warehouse: [Redacted]
 Expected Delivery: 06/25/2024 12:00 AM
 Cancel By Date: [Redacted]
 Currency: USD
 Instructions: Invoice instructions...
 Total PO CBM: 3
 Total Weight: 4.31 lbs

STATUSES

Status: Ordered
 Priority: Normal
 Shipping Status: None
 Receiving Status: Not Received
 Invoiced Status: Not Invoiced
 Released For Receiving
 Picking Status: Not Picked

BILLING & PAYMENTS

Payment Terms: None
 Memo: Invoice memo...
 Over Received: \$0.000

CHANGES

Created By: [Redacted]
 Updated By: [Redacted]
 Created On: [Redacted]
 Updated On: [Redacted]

4. Fill in Qty to Ship to determine the number of products to return, populate all necessary fields, and click **Ship Items**.

CANCEL SHIP ITEMS

SESSION DETAILS

Receive Invoice# (optional)
 Vendor Order ID (optional)

ITEMS

SKU	VEND. SKU	PRODUCT NAME	QTY ORDERED	QTY SHIPPED	QTY TO SHIP	WAREHOUSE	LOC	UNIT PRICE	DISCOUNT	LIST PRICE	WEIGHT	UPC	PICKING BIN	QTY	QTY PICKED
[Redacted]	[Redacted]	[Redacted]	10	0	0	[Redacted]	Locatir	\$5.00	0%	\$25.00	2 lbs	0 oz	30114296		

5. A **Queued job** will be generated, from which you can monitor the status of the task. Once its status is **Completed**, the product's Inventory and PO's Average Cost calculations will be updated.

You also have the option to ship Credit Memos from the **Manage POs** page:

1. Navigate to **Purchasing > Manage POs**.
2. Select the required **Credit Memo** from the grid.
3. Access the **Actions** menu and click **Receive Selected** to mark it as received by its Vendors.

skystack

Search for anything, sku, customers, etc.

MANAGE PURCHASE ORDERS

Default filters: Keyword, PO IDs, Company, Statuses, PO Type Credit Memo, Receiving Statuses, Approval Status, Vendor, SKU

Custom filters: Created On Last 120 Days

SEARCH CLEAR SAVE VIEW

Sort by: PO #

PO #	PO TYPE	DESCRIPTION	VENDOR	VAL. NOT REC.	CREATED ON	ORDERED ON	PO APPROVED	PO STATUS	RECEIVING STATUS	PAYMENT STATUS	REQUESTED ON	BALANCE	UNITS	GRAND TOTAL
<input checked="" type="checkbox"/>	1234454787	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454785	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454730	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454724	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454723	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454668	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454605	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454604	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454552	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454517	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454487	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454474	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454367	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454366	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454365	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454343	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454320	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	1234454319	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

Search...

FAVORITES
Try starring some items from the list below.

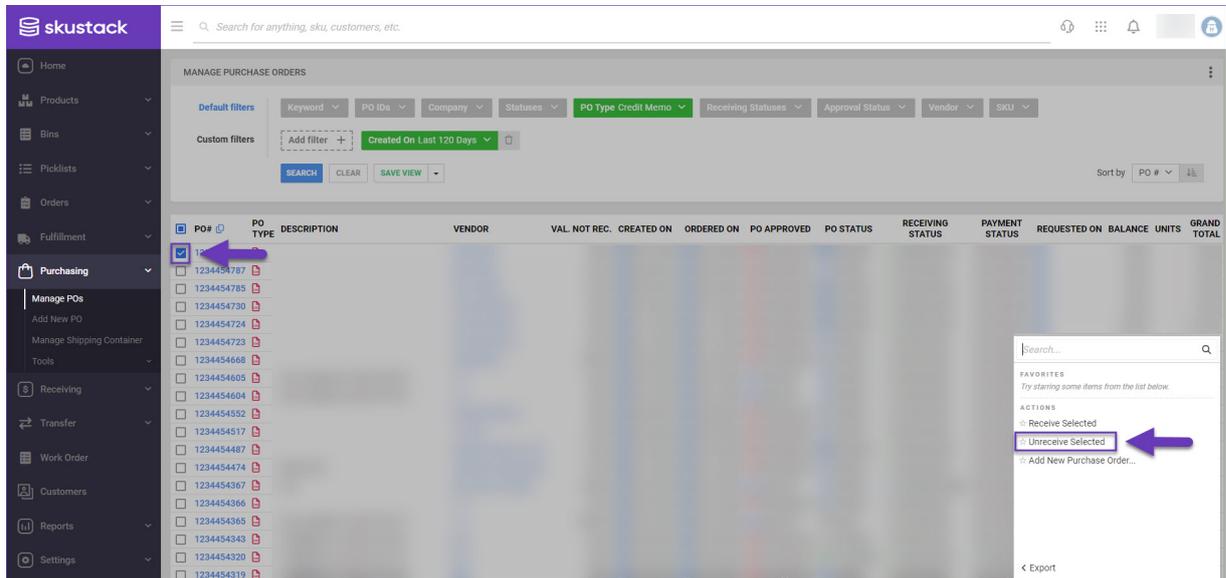
ACTIONS

- Receive Selected**
- ☆ Unreceive Selected
- ☆ Add New Purchase Order...

Export

To mark a Credit Memo as **Not Received** by its Vendor:

1. Navigate to the **Manage POs** page and select the required Credit Memo from the grid.
2. Access the **Actions** menu and choose **Unreceive Selected**.
3. A **Queued job** will be generated, from which you can monitor the status of the task. Once successfully completed, the Credit Memo will be unshipped.

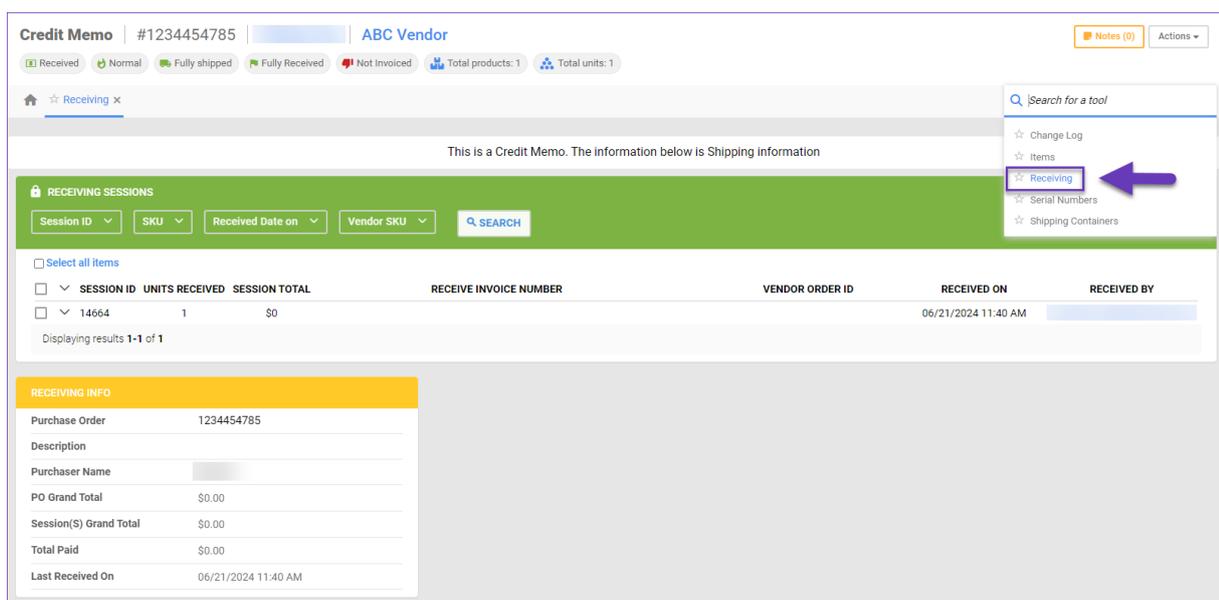


Search Receiving Sessions

On the Credit Memo's **Receiving** page, you can view its Shipping details. To display the list of Receiving sessions, navigate to the memo's **Toolbox** and choose **Receiving**.

You can filter the list of **Receiving Sessions** by:

- **Session ID** – Search sessions by their unique identification number.
- **SKU** – Show only sessions with a specific SKU.
- **Received Date On** – Show sessions by their receive date.
- **Vendor SKU** – Show sessions based on the received item's **Vendor-Specific SKU**.



The **Receiving Sessions** grid shows the following details about each session:

- **Session ID** – The unique ID of the receiving session. Clicking the dropdown arrow to the left of the Session ID

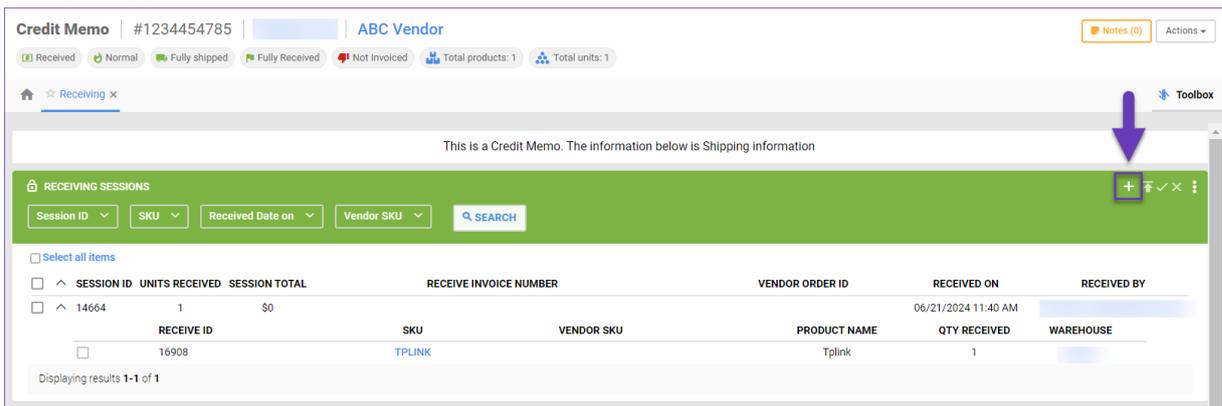
displays an additional row with more details:

- **Receive ID** – Each SKU within a receiving session has a unique Receive ID.
- **SKU** – The product’s SKU.
- **Vendor SKU** – The product’s Vendor-Specific SKU.
- **Product Name** – The product’s name.
- **Quantity Received** – The number of product units received in the session.
- **Warehouse** – The warehouse where the item has been received.
- **Units Received** – The number of received units.
- **Session Total** – The total amount paid for the received items.
- **Receive Invoice Number** – The number of the invoice associated with the receiving session.
- **Vendor Order ID** – The number of the associated order issued by the vendor.
- **Received On** – The date when the receiving session was added.
- **Received By** – The Employee who completed the receiving session.

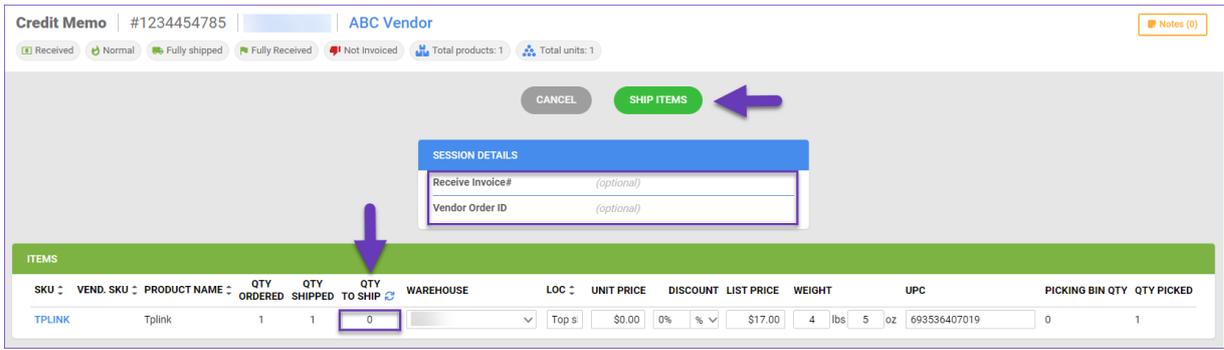
Add and Delete Receiving Sessions

To add a new Receiving Session:

1. Open a Memo’s **Receiving** page.
2. Click the **Edit** icon at the top right of the **Receiving Sessions** panel.
3. Click the **+** icon.

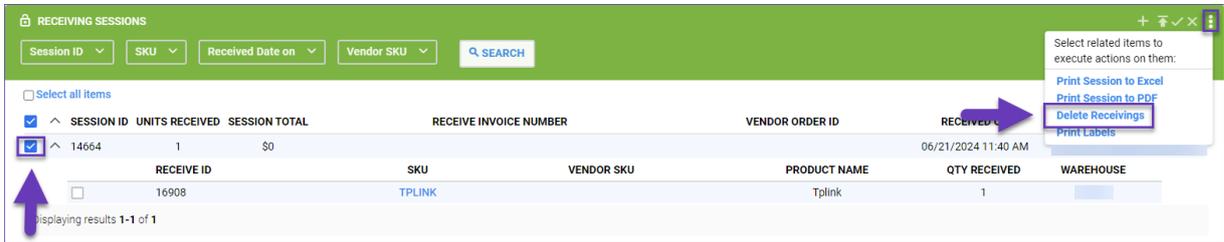


4. Optionally, in the **Session Details** panel, you can enter:
 - a. **Receive Invoice #** – The number of the invoice associated with the receiving.
 - b. **Vendor Order ID** – The number of the associated order issued by the vendor.
5. In the **Items** panel:
 - a. **Quantity To Ship** – Enter the number of products to ship or click the blue arrow icon to autofill the remaining quantity of all SKUs.
 - b. Optionally, update the rest of the details.
6. Click **Ship Items**.



To delete receiving sessions in regular warehouses:

1. Open the required Credit Memo's **Receiving** page.
2. Check the box next to the Session ID, to select it.
3. Click three dots at the top right and select **Delete Receivings**. Note that you can't undo this action.



Receiving sessions can only be deleted if they are not associated with a **Bin-Enabled Warehouse**.

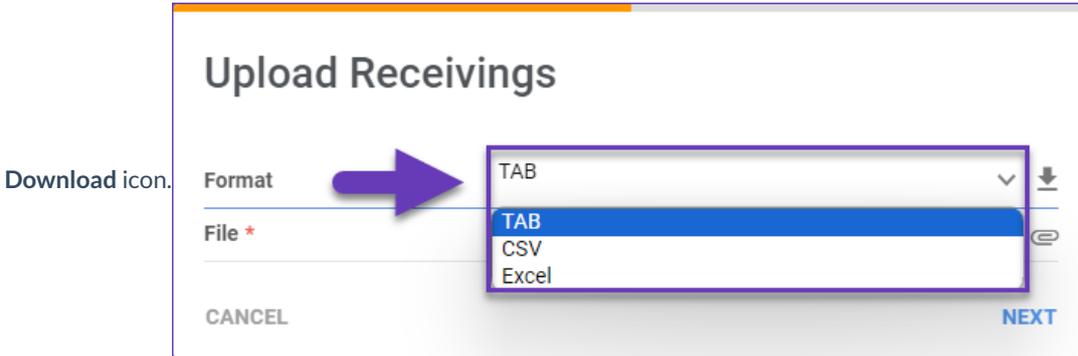
Bulk Import Receiving Sessions

To bulk-import receiving sessions:

1. Click the **Edit** icon at the top right of the **Receiving Sessions** panel.
2. Click the **Upload Receivings** icon.



3. To download a sample template, select the appropriate file **Format** (Tab delimited, CSV, or Excel) and click the

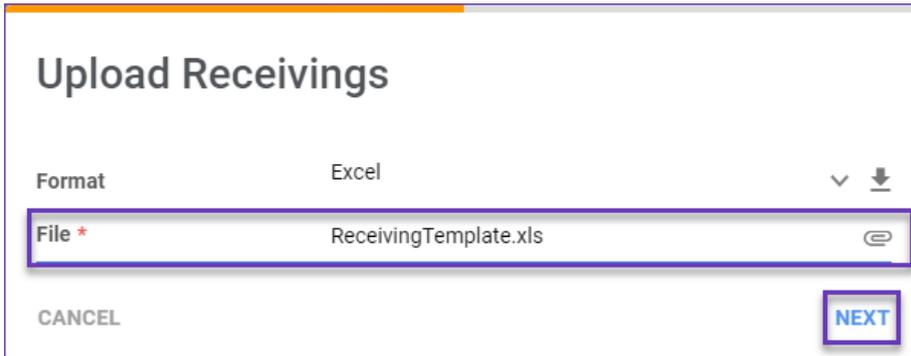


4. Open the file and populate the following columns:

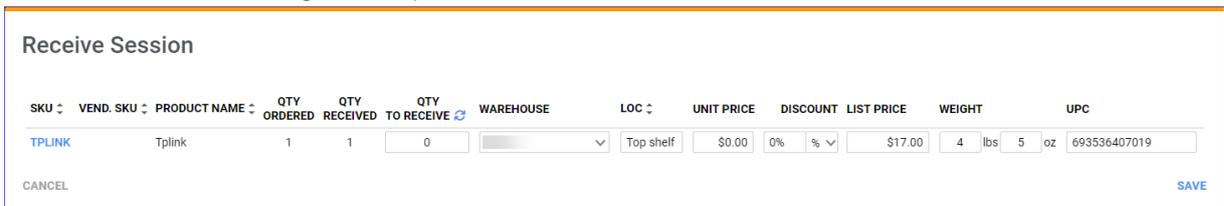
- a. **ID** – The Receiving Session ID.
- b. **ProductID** – The item’s SKU.
- c. **QtyReceived** – The quantity to receive.
- d. **BinName** – If you are receiving to a [Bin-Enabled Warehouse](#), enter the bin name. Otherwise, leave this column blank.

5. Save the updated template.

6. Return to the **Upload Receivings** popup, upload the file, and click **Next**.



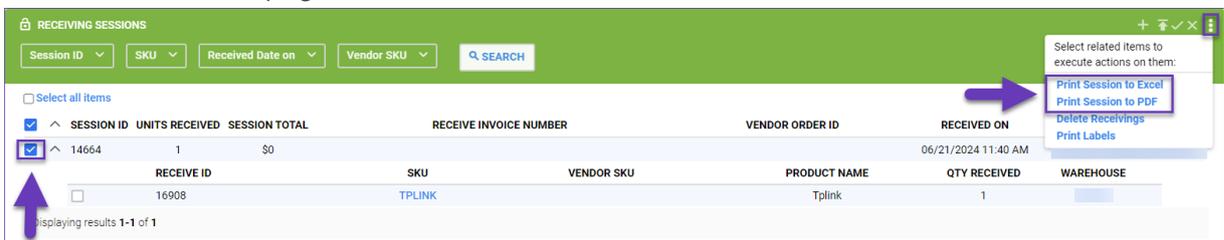
7. In the **Receive Session** dialog box, complete the rest of the details and click **Save**.



Print Sessions

To export session details to a PDF file or an Excel spreadsheet:

1. Open the required Credit Memo’s **Receiving** page.
2. Check the boxes next to the Session IDs, to select them.
3. Click three dots at the top right and select **Print Session to Excel/PDF**.

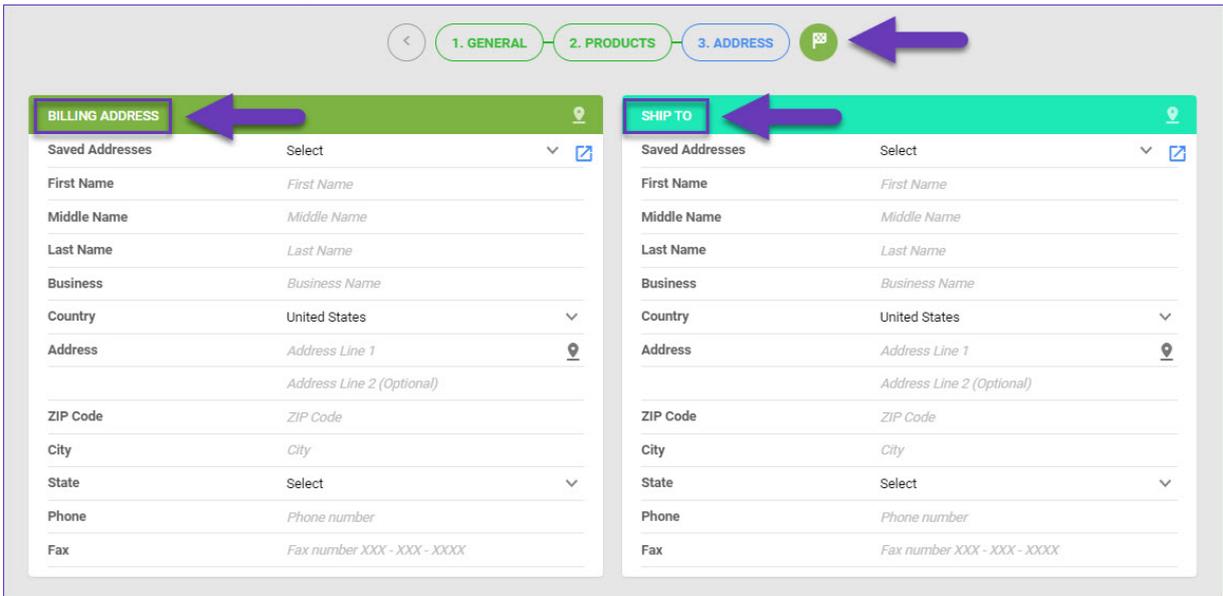


Print Labels

To print Product or Location labels for the SKUs in a Receiving Session:

1. Open the required Credit Memo’s **Receiving** page.
2. Check the boxes next to the Session IDs, to select them.

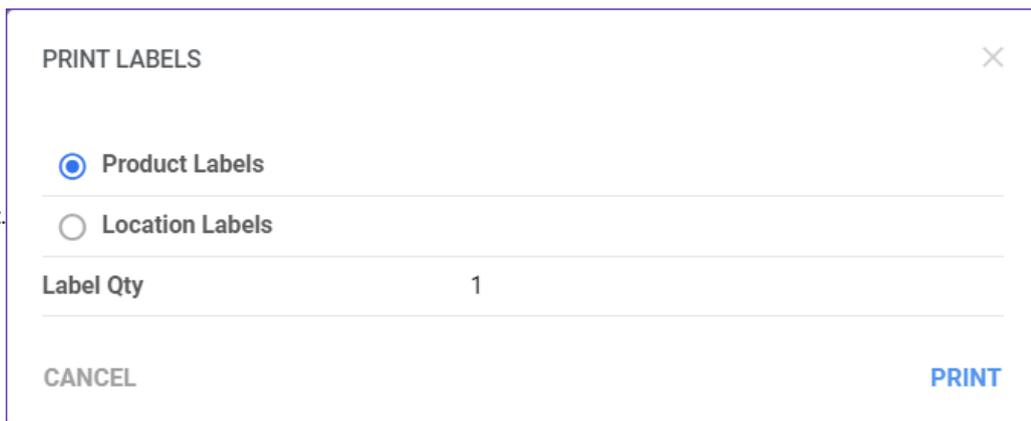
3. Click three dots at the top right and select Print Labels.



4. Select the Label type you want to print – either Product or Location.

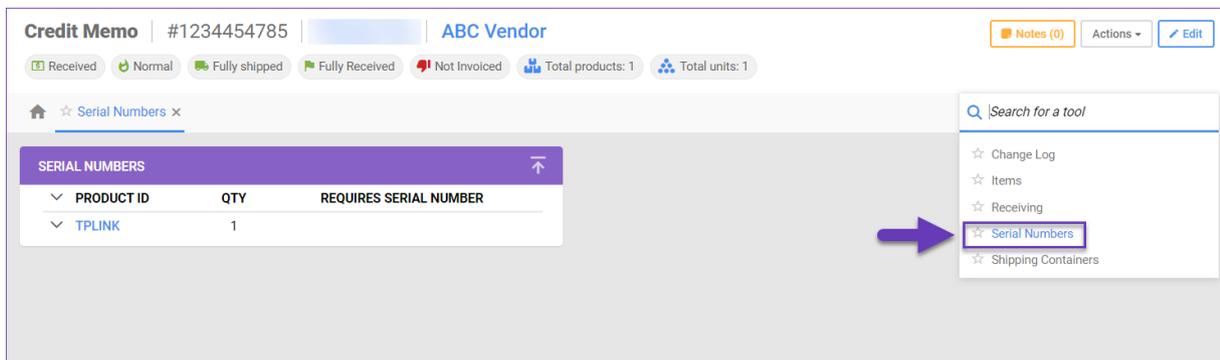
5. Enter the Label Quantity to print.

6. Click Print.



Product Serials

If the Credit Memo products have [Serial Numbers](#), you can view and manage them by clicking **Toolbox** and selecting **Serial Numbers**.



If required, you can import product Serial Numbers in a few simple steps:

1. Click the **Upload Serials** icon.

Credit Memo | #1234454785 | **ABC Vendor**

Received
Normal
Fully shipped
Fully Received
Not Invoiced
Total products: 1
Total units: 1

Serial Numbers

SERIAL NUMBERS		
PRODUCT ID	QTY	REQUIRES SERIAL NUMBER
TPLINK	1	

2. Click **Download Template**.

UPLOAD SERIAL NUMBERS

Click or drag file here to upload serial numbers

DOWNLOAD TEMPLATE ↓

CANCEL UPLOAD

3. Populate the **ProductID**, **Serial Numbers** and **Notes**, and **Save** the file.

4. Return to the **Upload Serial Numbers** popup, add the file, and click **Upload**.

UPLOAD SERIAL NUMBERS

SerialsImport.xlsx

DOWNLOAD TEMPLATE ↓

CANCEL **UPLOAD**

Shipping Containers

Any **Shipping containers** associated with a Credit Memo can be viewed by navigating to the memo's Toolbox and selecting the **Shipping Containers** tab. Further information on Shipping Containers can be found [here](#).

Credit Memo | #1234454790 | ABC Deals Notes (0)

Ordered Normal None Not Received Not Invoiced Total products: 1 Total units: 1

Shipping Containers x

SHIPPING CONTAINERS



No records to display

Displaying results 0-0 of 0

Search for a tool

- ☆ Change Log
- ☆ Items
- ☆ Receiving
- ☆ Serial Numbers
- ☆ Shipping Containers



Related Settings

SETTING	DESCRIPTION
<p>Validate serial globally</p>	<p>Client Setting. Enables serial number validation in Skustack. Learn more about serial number validation and relevant client settings here.</p>
<p>Require serial scan when picking</p>	<p>Skustack's Warehouse Management setting. When enabled, will force the user to scan serials for products that are set to require serial scan.</p>
<p>Auto populate progress quantity when bin is selected</p>	<p>Skustack's Warehouse Management setting. When a bin is selected, the Pick Qty field will automatically be set to the total quantity available in that bin, up to the quantity required.</p>