

Credits Added through API Not Showing Line-Item Details

09/16/2024 5:10 pm EDT

Issue:

We need to create Credit Memos using the API. When we send the request the credit is created but when opened in SedonaOffice the details are not displaying.

The screenshot shows the SedonaOffice Credit Memo form. The form is titled 'Credit Memo' and has a date range of 6/24/2024 - 7/24/2024. The customer information is ZZ Juliette Hale, 123 North Canton Road, Canton, NY 48187. The credit date is 6/24/2024, and the credit number is 497819. The credit type is 000. The item list is empty. The operation is set to 'Recurring' and the credit reason is 'Issued in Error'. The memo text is 'Converted but already paid in MedScope CRM'.

Resolution:

One reason this can happen is if the CustomerSiteID is not being sent in with the request.

This is required so the application can display all the information correctly.

Below is sample JSON that will create a credit memo and apply it to an invoice.

POST to /api/credit

```
{  
  
  "TypeJSCO": "C",  
  
  "CustomerId": 52554,  
  
  "CustomerSiteId": 59913,  
  
  "CategoryCode": "Admin G & A",
```

```
"Amount":"85.0000",

"InvoiceDescriptionCode":"Recurring",

"ServiceStartDate":"2024-06-24",

"ServiceEndDate":"2024-07-24",

"Memo":"Converted but already Paid",

"CustomerBillId":53601,

"BranchId":2,

"BranchCode":"OH",

"CreditReasonId":5,

"CreditReasonCode":"Invoiced in Error",

"Complete":true,

"UserCode":"pete.cava",

"CreditItems":

[

  {

    "CustomerSiteId":59913,

    "ItemId":157,

    "ItemCode":"Time & Material 85",

    "PartId":1,

    "PartCode":"NVA",

    "Description":"Credit for Invoice :497818",

    "Quantity":1,

    "UnitOfMeasureCode":"EA",

    "Rate":"85.0000",

    "Amount":"85.0000",

    "ServiceStartDate":"2024-06-24",
```

```
"ServiceEndDate":"2024-07-24",

"Memo":"Converted but already Paid",

"InterBranchRegisterId":1,

"BillCycle":"N",

"ServiceTicketId":1

}

],

"CreditDetails":

[

{

"Date":"2024-06-24",

"TypeIM":"I",

"InvoiceNumber":"497818",

"Amount":"85.0000",

"BranchId":2,

"BranchCode":"OH",

"CategoryCode":"Admin G & A",

"UserCode":"joe.white"

}

]

}
```