## Exercise 9: Perform Write-Offs

### Write off a customer balance from the aged balances page

As a collection agent in **USMF**, you need to create a write off journal, since the Birch company is not going to pay the balance due to defective products that were shipped to them.

1. Navigate to **Credit and collections > Collections > Aged balances**.
2. Mark the row for the customer that you want to write off. For example, mark the line with **Birch Company** on it.
3. On the Action Pane, select **Collect**.
4. Select **Write off**
5. Select **OK**
6. Close the page
7. Navigate to **General ledger > Journal entries > General journals**.
8. Select the journal batch number for the journal that contains your write-off. One line is created to reverse the customer balance. One or more lines are created to post the write-off to the write-off account.
9. Close all forms

### Write off transactions from the collections form.

1. Navigate to **Credit and collections > Collections > Aged balances**.
2. Select the name of the customer that has the transactions that you want to write off. For example, select the link for Cave Wholesales (**US-004**).
3. Mark the row for the first transaction.
4. Select **Write off**
5. Select **OK**
6. Close all pages
7. Navigate to **General ledger > Journal entries > General journals**.
8. Select the journal batch number for the journal that contains your write-off and view the **Lines**. One line is created to reverse the customer balance. One or more lines are created to post the write-off to the write-off account.
9. Close all pages

### Write off an invoice from the Open customers invoices page

1. Navigate to **Accounts receivable > Invoices > Open customer invoices**.
2. Mark the line for an invoice. For example, mark the line for **CIV-000715**.
3. On the Action Pane, select **Invoice**.
4. Select **Write off**
5. Select **OK**
6. Close the page

### Write off a customer balance from the customer page

1. Navigate to **Accounts receivable > Customers > All customers.**
2. Select a customer account. For example, select **US-001** (Contoso Retail San Diego).
3. On the Action Pane, select **Collect**.
4. Select **Write off**
5. Select **OK**
6. Close the page