magmodules

Credit Memo Grid

Yuki Integration for Magento 2

This page explains the credit memo grid in the Yuki Connection for Magento 2. Credit memos represent refunds issued against invoices. Yuki treats credit memos as negative sales invoices - the module automatically negates the amounts during sync, so you don't need to do anything special. The credit memo grid works the same way as the invoice grid: you can view sync status, trigger manual syncs, and manage entries from here.

Location: Accounting -> Data -> Credit Memos

Columns

Column	Description
ID	Internal record ID in the module's database table
Store View	The Magento store view the credit memo belongs to
Credit Memo	Credit memo increment ID - links to the Magento credit memo detail page
Order	Order increment ID - links to the Magento order detail page
Customer Company	Company name from the billing address
Customer Name	Full name of the customer
Country	Billing country
Grand Total	Total credit memo amount including tax
Tax	Tax amount on the credit memo
Credit Memo Date	Date the credit memo was created in Magento
Updated At	Last time this record was updated by the module

The following columns are hidden by default but can be enabled via the column picker:

- Credit Memo Entity ID
- Order Entity ID
- Customer ID
- Currency
- Base Currency
- Base Exchange Rate
- Global Currency
- Global Exchange Rate

- Credit Memo Status
- Created At

Yuki-Specific Columns

When a credit memo has been added to the Yuki sync queue, three additional columns become relevant:

Column	Description
Sync Status	Current status: Pending, Synced, Error, or Skipped
Attempts	Number of sync attempts made. Sync stops retrying after 3 failed attempts
Reference	The reference returned by Yuki after a successful sync

How Credit Memos Enter the Grid

1. A credit memo is created in Magento against an existing invoice.
2. If automation is enabled in the configuration, the credit memo is automatically added to the sync queue. If automation is disabled, you can add it manually via the row action.
3. Requirements are the same as for invoices: module enabled, store configured with valid Yuki credentials, and complete billing information on the original order.

Important Notes

- Credit memos create negative sales invoice entries in Yuki. The module handles the sign inversion automatically during sync.
- Partial refunds are supported. The module syncs the exact amounts from the Magento credit memo.
- Tax amounts are calculated and negated automatically based on the credit memo line items.

Row Actions

Actions available per credit memo row:

- **View Credit Memo** - Opens the Magento credit memo detail page
- **View Order** - Opens the Magento order detail page
- **Sync to Yuki** - Immediately attempts to sync this credit memo to Yuki
- **Skip** - Marks the credit memo as Skipped so it is excluded from sync

- **Delete** - Removes the credit memo record from the module grid (does not affect the Magento credit memo)

Mass Actions

Select multiple credit memos and use the actions under the **Yuki** submenu in the mass actions dropdown:

- **Sync** - Immediately attempt to sync the selected credit memos
- **Add to Queue** - Set status back to Pending so the cron job will pick them up
- **Skip from Queue** - Mark the selected credit memos as Skipped

Need More Help?

Documentation:

- All Help Articles - Complete documentation overview

Support:

- Contact Support - Get help from our team

For a complete overview of features and configuration options, see the Yuki Integration extension on magmodules.eu

All articles for Yuki Integration

Installation

1	Installation using Composer (recommended)
2	Installation using the Adobe Marketplace
3	Install through FTP and SSH

Configuration

1	Configuration Guide
2	OSS Tax Rules
3	Quick Start Guide

Grids

1	**Credit Memo Grid (current)**
2	Customer Grid
3	Invoice Grid
4	Synchronisation Logs

Background

1	Best Practices
2	CLI Commands