

SALES

CUSTOMERS - CREDIT NOTES

After a Credit Note has been created, it has to go through an approval process which includes:

- Releasing Credit Note for Approval / Removing Credit Note from Approval
- Approving / Rejecting Credit Note
- Print Credit Note (this step will post the transaction to Pastel)

Ribbon Access: Sales > Customers



- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site* where the Customer can be located.
 - The example has *Durban* selected.
- 3. Select the *Status* for the Customer.
 - The example has *Active* selected.
- Select the *row* of the *customer* whose credit note(s) you wish to work with.
- 5. Click on the *Credit Notes* tile.



Customers - Credit Notes

		1-	Custom	ner Listing - E	PO: Versio	n 2.4.0.11 - Exa	ample Company			
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Journals	DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	98/7654321
	OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321
	YES001	CO	Young Electric			Durban	100,000.00		082555555	2314687641
Quotes	WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456789
	TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258741369
	BOT0001	Π	Bothas Networking inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201
Ordere	SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
Orders	DAN001	Π	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
	PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789
	HAC001	Π	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155
Invoices	PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
	HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000
	JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	123456789
Contract Invoices	LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789
	GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456789
	FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
Credit Notes	BET0001	RE	Betties Summer Shop at t			Durban	0.00			1234
-	biancad	RE	North West Branch			Durban	0.00			0
	DAN002	п	Danung Sheec			Durban	10,000.00		031 123 4567	123456789
Contract Credit	BIG0001	CO	Big Bargains	-5		Durban	10,000.00		031 456 7897	123456789
Notes	MAN0001	RE	Mandy Norton			Durban	0.00			0
	DAN0003	Π	Dance Shoes			Durban	0.00			123456789

ADD CREDIT NOTE

- 1. The *Sales Credit Notes for Customer [Customer Code]* screen will display.
- 2. Click on Add.

Short cut key: *Right click* to display the *Process* menu list. Click on *Add*.





- The Add new Customer Credit Note screen will be displayed. " on page 2
- 4. Complete the Customer Credit Note details as required.
- 5. Click on *Related Ref* tab to link any reference information related to the Credit Note, e.g. Project Reference, Reason Code, Invoice Number etc.
- Click on *Save* to save the credit note as a *New* Credit Note and return to the *Sales Credit Notes for Customer* screen.

A system generated *Credit Note Number* will be issued for the Credit Note.

For a detailed handling of this topic refer to Credit Notes - Issue a Credit Note



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EDIT CREDIT NOTE

- 1. From the *Sales Credit Notes for Customer [Customer Code]* screen;
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Ensure that the **Status** has been set to *New*.

You can edit credit notes only in the New Status.

- 4. Select the *row* of the Sales Credit Note you wish to edit.
- 5. Click on *Edit*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Edit*.





- 6. "The Edit Customer Credit Note [credit note number] screen will be displayed. " on page 2
- 7. You can make changes to the *Heading Information*, *Addresses* or *Related References tabs*.
 - For the purpose of this manual, a Reason Code has been added to the *Related Ref* details.
- You can *add* credit note items or *delete* an item from the *Credit Note Items* frame.
- Click on *Save* to save the changes to the Credit Note and return to the *Sales Credit Notes for Customer* screen.

For a detailed handling of this topic refer to Credit Notes - Edit Credit Note



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Home	Equipment	/Locations	Contract	Fini	ance / HR Inve	entory Mainten	ance / Projects	Manufacturing	Procurement	Sales Se	rvice Repo	orting Ut	ilities		- 8	х
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Salesman	Joseph Timber		•	•				-			Serial No	18	818-0935			
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CANCEL A CREDIT NOTE

- 1. From the *Sales Credit Notes for Customer [customer code]*;
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Ensure that the **Status** is set to *New*.

You can cancel Credit Notes only in the New Status

- 4. Select the *row* of the Credit Note you wish to *cancel*.
- 5. Click on *Delete*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Delete*.





- 6. When you receive the *Confirm delete Credit Note* message;
 - Are you sure you want to delete this quote?
- 7. Click on Yes.

For a detailed handling of this topic refer to Credit Notes - Cancel a Credit Note



\$ 7					Sales C	redit Notes for C	ustomer CU500	1 - BPO: \	/ersion 2.4,0.11	- Examp	ple Company			_ – ×
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The Credit Note will be removed from the *Sales Credit Notes for Customer* screen.

VIEW CREDIT NOTE

- 1. From the *Sales Credit Notes for Customer [customer code]* listing screen.
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Select the **Status** of the Credit Notes you wish to view.

You can view credit notes in the Released or New status.

- 4. Select the *row* of the Credit Note you wish to view.
- 5. Click on View.





6. The *View Credit Note - [credit note number]* screen will display.



7. Click on *Back* to return to the *Sales Quotes for Customer* screen.



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Home	Equipment /	Locations	Contract	Finance / HR Inv	entory Maintenar	nce / Projects Man	ufacturing	Procuremen	nt Sales Serv	rice Repo	orting Ut	ilities		- 8	×
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Salesman	Joseph Timber			•			Shipping	address							- 11
Billing Customer	Cash Sales Aco	ount		 Billing Contact 	Customer Contact		-		A						- 11
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Return Items t	o Store						Addresse	s Related	l Ref						
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RELEASE FOR APPROVAL

- 1. From the *Sales Credit Notes for Customer [customer code]* listing screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Ensure that the **Status** has been set to *New*.

You can release credit notes for approval only in the New status.

- 4. Select the *row* of the Credit Note you wish to release for Approval.
- 5. Click on *Release for Approval*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Release*.



- 6. When you receive the *Sales Credit Note Release* message to confirm;
 - The credit note number [credit note number], has been released for authorisation successfully.
- 7. Click on *OK*.

For a detailed handling of this topic refer to Credit Notes - Release for Approval

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	Home	Equipment	Locations (Contract Fir	nance / HR	Inventory	y Mainte	enance / Projec	ts Mar	nufacturing	Procurement	t Sales	Service	Reporting	Utilities	_	8 x
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The Status for the Credit Note has changed to *Released*.

PLACE ON HOLD

- 1. From the *Sales Credit Notes for Customer [customer code]* listing screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Change the **Status** to *Released* to list all the Credit Notes that have been Approved.



Only credit notes that have been Released can be placed on hold.

- 4. Select the *row* of the Credit Note you wish to remove from approval.
- 5. Click on *Remove from Approval*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Remove*.

- 6. When you receive the *Sales Credit Note Hold* message to confirm;
 - The credit note number [credit note number], has been placed on hold successfully.
- 7. Click on *OK*.

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For a detailed handling of this topic refer to Credit Notes - Place on Hold

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Home Equipment	/Locations Contract Fin	ance / HR. Inventory Main	ntenance / Projects Manufacturin	g Procurement Sales	Service Reporting	Utilities	- 8	×
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	8	Sales Credit Note	- Hold edit note number CN0000146, has I sfully.	X been placed on hold				

The Credit Note Status has changed to *New*.



APPROVE CREDIT NOTE

- 1. From the *Sales Credit Notes for Customer [customer code]* listing screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Change the **Status** to *Released*.



- 4. Click on the **row** of the Credit Note you wish to approve.
- 5. Click on *Approve Cr Note*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Approve*.

- 6. When you receive the *Input Validation* message to confirm;
 - Are you sure you want to Approve cr note no. [credit note number].
- 7. Click on Yes.

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For a detailed handling of this topic refer to Credit Notes - Approve Credit Note





The credit note Status Description has been updated to Approved.

REJECT CREDIT NOTE

- From the Sales Credit Notes for Customer [customer code] listing screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Change the **Status** to *Released*.

Only credit notes that have been Released can be rejected.

- 4. Select the **row** of the Credit Note you wish to reject.
- 5. Click on *Reject Cr Note*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Reject*.



- 6. When you receive the *Input Validation* message to confirm;
 - Are you sure you want to Reject cr note no. [CNcredit note number].
- 7. Click on Yes.

For a detailed handling of this topic refer to Reject Credit Note



PRINT CREDIT NOTE

Credit notes that have been *Approved* and have been *Printed* will be available for printing.

- 1. From the *Sales Credit Notes for Customer [customer code]* screen.
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Select the **Status** you required.
 - The example has *Approved* selected.
- 4. Select the *row* of the Credit Note you wish to print.



- 5. Click on **Print**.
- 6. The *Select the option as desired* screen will display.
- 7. Select the print option you require.

When selecting to *Email Invoice*, the invoice will be emailed via the *BPO Email Service* on the server (not from MS Outlook).

- The example has *Print Credit Note* selected.
- 8. Click on *Accept*.



- 9. The *Tax Credit Note* will display in the Preview screen.
- 10. From this screen you can make cosmetic changes to the document, as well as *Save*, *Print*, *Add a Watermark*, *Export* or *Email* the Invoice.
- 11. *Close* this screen to return to the *Sales Credit Notes for Customer* screen.





SEND CREDIT NOTES TO PRINT QUEUE

You can send Credit Notes directly from the Print Queue from the *Sales Credit Notes for Customer* screen, instead of going to the Print Queue Reprint screen. This will enable you to forward a batch of credit notes to the customer.

- 1. From the Sales Credit Notes for Customer [customer code] screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Change the **Status** to **Printed**.
- Select the *row* of the credit note, or select a *batch* of credit notes, you wish to send to the Print Queue.
 - Select a Range: Click in the *row* of the first credit note. Hold down the Shift key on your keyboard and click in the *row* of the *last credit note* in your list.



• Select alternate Invoices: Hold down the Ctrl (Con-

trol) key on your keyboard and click in the *row* of each Credit Note you want to include in the Print Queue.

- 5. Click on *Send Cr Notes to Print Queue.*
- 6. When you receive the *Print Queue Processing* message to confirm;
 - The selected items have been sent to the print queue.
- 7. Click on OK.

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Home Equipment	t/Locations Contract Financ	e / HR Inventory Maintenance / Projects	Manufacturing Procure	ement Sales Service	Reporting	Utilities	- & ×
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	CN0000068 CUS001	Cash Sales Account		Printed	pos lite	ZAR.	1.00
Returns	CN0000117 CUS001	Cash Sales Account		Printed	1234	ZAR	1.00
		The selected items have	been sent to the print queue				

CREDIT NOTE RETURNS

From the Sales Credit Notes for Customer screen you can view the *Credit Note Returns* for *OTC* and *POS* Invoices.

When the Credit Note is issued from the Call Screen or the Project Screen then the *Credit Note Returns* needs to be viewed from the *Credit Note Returns tab* on the <u>Call Screen</u> or the <u>Project Screen</u>

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Return requests can be raised for a Credit Note to Return Stock to Store for a Customer

- 1. From the Sales Credit Notes for Customer [customer code] screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Change the **Status** to **Printed**.
- 4. Select the *row* of the credit note you wish to view the returns for.
- 5. Click on the *Returns* tile.



- 6. The *Returns for Sales CrNote : CR[credit note number]* screen will display.
- From this screen you can <u>view</u> any *return items* linked to the selected credit note.
- 8. Click on *Print* to print the Parts Issue Note.
- 9. Click on *Back* to return to the *Sales Notes for Customer* screen.

For a detailed handling of this topic refer to Credit Notes - Returns



Customers - Credit Notes

1	Ŧ		6	Returns for !	Sales CrNote : CN0000068 -	BPO: Version 2.5.0.4 - Exam	ple Company v2.5.0.0				x
	Home	Equipment / I	ocations Cont	tract Finance / HR	Inventory Maintenance	e / Projects Manufacturing	Procurement Sales	Service Repo	orting Utilities	_	a x
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► RE	00000102	RETURN	21/04/2017	2020-147C	Cyan toner SP2020	OTC_Whse_DBN	OTC_Bin_DBN	147c	448.319	2.00)
RE	00000102	RETURN	21/04/2017	2020-147L	SP2020 Clear Toner	OTC_Whse_DBN	OTC_Bin_DBN		400.000	1.00)
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