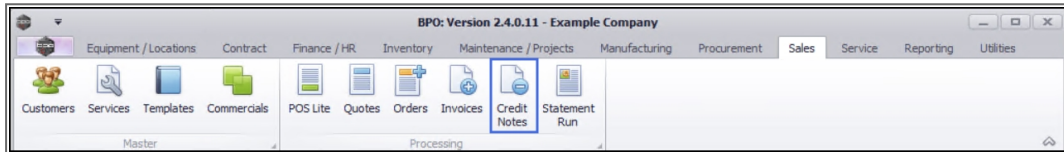


## SALES

### CREDIT NOTES – PARTIAL CREDIT NOTE

Ribbon Access: *Sales > Credit Notes*



1. The **Sales Credit Notes** listing screen will be displayed.
2. Select the **Site** where the credit note was created.
  - The example has **Durban** selected.
3. Change the **Status** to **New**.

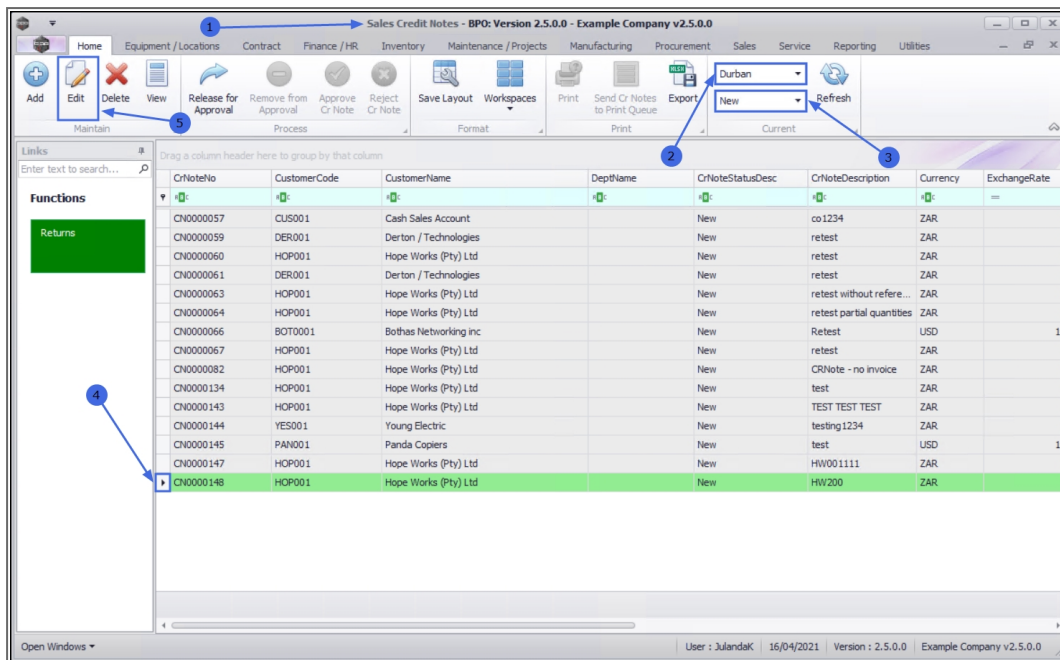


A Credit Note can only be edited in the **New** status.

4. Click on the **row** of the credit note you wish to edit.
5. Click on **Edit**.



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



6. The **Edit Customer Credit Note - CN[credit note number]** screen will be displayed.

## CREDIT AN ITEM

7. In the items data grid, click on the **row** of the item you wish to remove from the credit note.
8. Click on **Delete Item**.



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

9. When you receive the **Confirm delete line** message to confirm;
- **Are you sure you want to remove this line from the credit note?**
10. Click on **OK** if you are certain about your selection.

6 → Edit Customer Credit Note - : CN0000148 - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Hope Works (Pty) Ltd  
Contact Name Mandy Jefferson  
Commercial Type Class Commercial  
Salesman John Twain  
Billing Customer Hope Works (Pty) Ltd  
Cr Note Currency South African Rand  
Tax Rate 15.00

Reference HW200  
Status N  
Date & Time 16/04/2021 15:51:36  
Billing Contact Mandy Jefferson  
Exchange Rate 1.00

Billing address  
PO Box 7452  
Forest Hills  
New Town

Shipping address  
Plot 91 Leaf Road  
Leaf Hills  
Pink Town  
Durban South

☒ Return Items to Store

SuppressOnPrint	ItemType	ItemCode	ItemDescription	CrNoteLineDescription	BatchSerialNo	WarehouseName	Quantity	UnitCost	Markup	Discount	ItemPrice
<input type="checkbox"/>	Parts	SP1717MFC	SP1717 Multi Functional Copier	SP1717 Multi Functional Copier		Main Warehouse	1.000	0.000	0.000	0.000	14,000.00
<input type="checkbox"/>	Parts	1717-147K	Black Toner SP1717	Black Toner SP1717		Main Warehouse	2.000	0.000	0.000	0.000	800.00
<input type="checkbox"/>	Labour	ITTECH	IT Technician	IT Technician			1.000	0.000	0.000	0.000	177.00
<input type="checkbox"/>	Select typ...										

7 → 8 → 9 → 10

Confirm delete line  
Are you sure you want to remove this line from the credit note?  
Yes No

Comment Labour incorrectly invoiced

Sub Total 15,777.00  
VAT 2,366.55  
Grand Total 18,143.55

Open Windows User : JulandaK 16/04/2021 Version : 2.5.0.0 Example Company v2.5.0.0

11. The item has been removed from the credit note items data grid.

Edit Customer Credit Note - : CN0000148 - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Hope Works (Pty) Ltd  
Contact Name Mandy Jefferson  
Commercial Type Class Commercial  
Salesman John Twain  
Billing Customer Hope Works (Pty) Ltd  
Cr Note Currency South African Rand  
Tax Rate 15.00

Reference HW200  
Status N  
Date & Time 16/04/2021 15:51:36  
Billing Contact Mandy Jefferson  
Exchange Rate 1.00

Billing address  
PO Box 7452  
Forest Hills  
New Town

Shipping address  
Plot 91 Leaf Road  
Leaf Hills  
Pink Town  
Durban South

☒ Return Items to Store

SuppressOnPrint	ItemType	ItemCode	ItemDescription	CrNoteLineDescription	BatchSerialNo	WarehouseName	Quantity	UnitCost	Markup	Discount	ItemPrice
<input type="checkbox"/>	Parts	SP1717MFC	SP1717 Multi Functional Copier	SP1717 Multi Functional Copier		Main Warehouse	1.000	0.000	0.000	0.000	0
<input type="checkbox"/>	Parts	1717-147K	Black Toner SP1717	Black Toner SP1717		Main Warehouse	2.000	0.000	0.000	0.000	0
<input type="checkbox"/>	Select typ...										

11

Comment Labour incorrectly invoiced

Sub Total 15,600.00  
VAT 2,340.00  
Grand Total 17,940.00

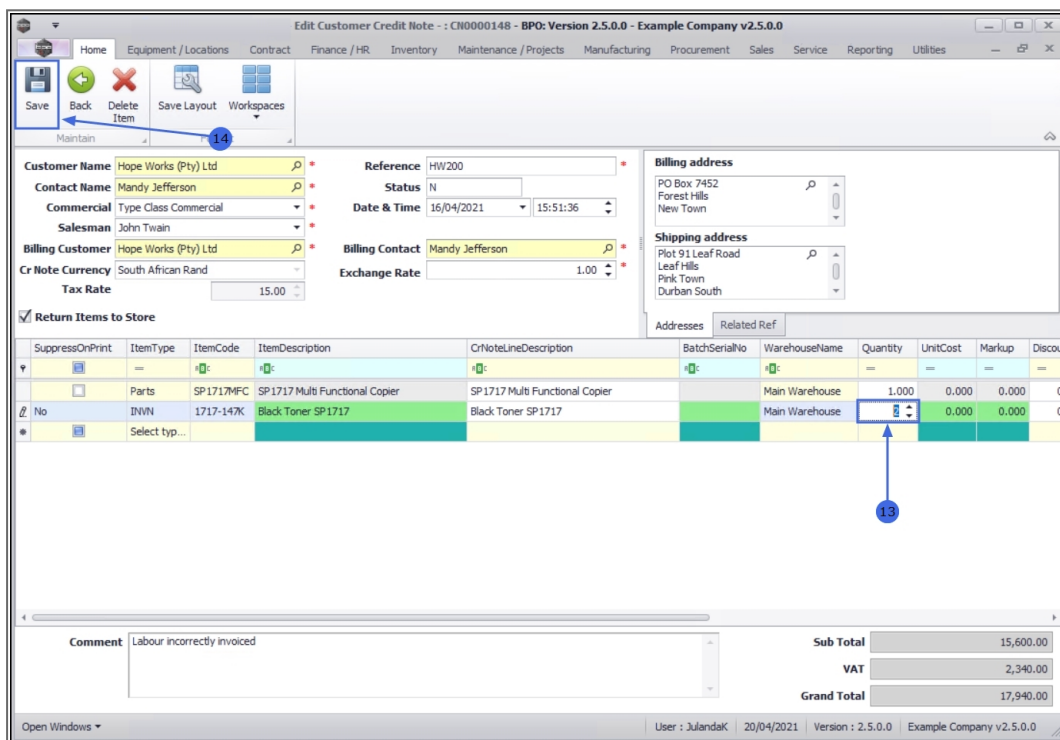
Open Windows User : JulandaK 20/04/2021 Version : 2.5.0.0 Example Company v2.5.0.0

## CREDIT A QUANTITY

12. Click in the **Quantity** column of the item you wish to change.
13. Type in or use the directional **arrows** to **edit** the quantity of the item being credited.

## SAVE CREDIT NOTE

14. When you have completed all the required information for the Credit Note, click on **Save**.



Edit Customer Credit Note - : CRI0000148 - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

Customer Name: Hope Works (Pty) Ltd  
 Contact Name: Mandy Jefferson  
 Commercial: Type Class Commercial  
 Salesman: John Twain  
 Billing Customer: Hope Works (Pty) Ltd  
 Cr Note Currency: South African Rand  
 Tax Rate: 15.00

Reference: HW200  
 Status: N  
 Date & Time: 16/04/2021 15:51:36  
 Billing Contact: Mandy Jefferson  
 Exchange Rate: 1.00

Billing address: PO Box 7452, Forest Hills, New Town  
 Shipping address: Plot 91 Leaf Road, Leaf Hills, Pink Town, Durban South

☒ Return Items to Store

SuppressOnPrint	ItemType	ItemCode	ItemDescription	CrNoteLineDescription	BatchSerialNo	WarehouseName	Quantity	UnitCost	Markup	Discou
	Parts	SP1717MFC	SP1717 Multi Functional Copier	SP1717 Multi Functional Copier		Main Warehouse	1.000	0.000	0.000	0
/ No	INVN	1717-147K	Black Toner SP1717	Black Toner SP1717		Main Warehouse	1.000	0.000	0.000	0
	Select typ...									

Comment: Labour incorrectly invoiced

Sub Total: 15,600.00  
 VAT: 2,340.00  
 Grand Total: 17,940.00

User: JulandaK | 20/04/2021 | Version: 2.5.0.0 | Example Company v2.5.0.0

You will return to the **Sales Credit Notes** listing screen.

## Related Topics

- [Create a Linked Credit Note](#)
- [Cancel or View a Credit Note](#)

- [Credit Note Process](#)
- [Credit Note Print Process](#)

MNU.064.005

