

SERVICE

CALLS - ADD A CREDIT NOTE

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the <u>Call Centre Mode</u> notes.

When Call Credit Notes are raised, remember the following:

- Partial credit notes can be raised.
- Select whether or not to return the stock to store.
- If you select to return to store, you **must** complete a return request in order to move your stock back to the warehouse.
- When credit notes are raised in order to adjust incorrect pricing on an invoice, there is no need to return the stock to store.

Ribbon Select Service > Calls



• The *Call Listing* screen will be displayed.

1BPO2 v2.5.1.3 or higher



·						Call	Listing - BPO: Version 2.5.1.4 - Example Company							
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ormation	EE CN0001003 Y	foung Bectric	13/12/2022	Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	CN0001002 5	Saman thas Diner	12/12/2022	Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
O New	E CN0001001 Y	foung Blectric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num	CR	Change Request			sin123		
in Progress	E CN0000996 H	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
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Complete	E CN0000991 A	Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - CO0000054	DR	Select Call Type					
O AI	E CN0000989 D	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
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Hold	EE CN0000985 H	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
Pending	E CN0000984 H	tope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
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() Al	E CN0000982 Y	roung Bectric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
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- The Calls are listed by *Site* and will display calls for the first Site listed.
- Click on the relevant *Site* for the calls you wish to view.



• Select the *Call* you wish to work with.



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	10963 Westwood Dynamic	25/10/2019	UnAssigned	08:1	:00:00	BathBinNaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hilcrest	
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E CN000096	10960 Westwood Dynamic	18/10/2019	UnAssigned	03:1	:00:00	BathBinMaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hilcrest	
E CN000099	0959 Westwood Dynamic	11/10/2019	UnAssigned	08:1	:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
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• Click on the *Edit* button.

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ape Town	E CN0000982					05:00:35	Test elapsed hours 1					sin123		
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Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
A		Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
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	⊞ CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
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- The *Call maintenance: Call ref. [call number]* screen will be displayed.
- Click on the *Credit Notes* tile.



Calls - Add a Credit Note

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CREDIT NOTE LISTING

- The *Sales Credit Notes for Call [call number]* screen will be displayed.
- Click on *Add*.



Calls - Add a Credit Note

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- The *Add new Customer Credit Note* screen will be displayed.
- Click on the *Related References* tab.



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- The Related References panel will be *expanded*.
- Click in the *text box* under the *Reference No.* column, in the *Invoice No.* row.





- An *ellipsis [...]* button will be revealed.
- Click on this ellipsis button to display a *Select the related invoice* for this order pop up screen.





- Click on the *row selector* in front of the *invoice* that you wish to *raise a credit note* for.
- Click on Ok.





- The selected invoice details will populate the *Items* data grid in the credit note screen.
- If a *stock item* was invoiced, a message box will pop up asking;
 - Do you wish to return the items to store?
- If you **do** want to return the items (if, for example, the incorrect part was invoiced) then click on *Yes*.
 - Note: Remember that you still need to return the stock using the Return Request screen, when the credit note is authorised and printed.



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If you have selected to *Return the Item to Store*, then a *Return Processing* message box will pop up, asking:



• Do the items being returned to the store need to be replaced?

- Select Yes If the part issued was the correct part, but is damaged / or has the incorrect serial number, and a new part of the same part code needs to be issued.
 - Note: Once the part has been returned to store, the part request will re-open to be fulfilled - a new part / correct serial number must be issued.
- Select **No** If you issued the incorrect part, or the order is cancelled.
 - Note: This will set the part request required quantity to zero as it is no longer required.



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• If you **not** do want to return the items to store (if, for example, the incorrect selling price was charged) then click on *No*.



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• You do have the option to use the *Return Items to Store* flag if you made the incorrect choice.



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• When you click on the *Return Items to Store* check box, a *Return Processing* screen will pop up asking;



- Do the items being returned to the store need to be replaced?
- You now have the opportunity to correct your previous choice, if required, and click on *Yes*.



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- In the Items data grid, each *part* line item will show whether;
 - a part will be *returned to stores* or,
 - a *replacement part* is required.



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• Ensure you have a *Reference* and *Comment* relating to the *reason* for this credit note.



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• In the *Related References* panel, *scroll down* until you can view the *Reason Code* row.



• Click in the *text box* under the *Reference No.* column, in the *Reason Code* row.

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- An *ellipsis [...]* button will be revealed.
- Click on this ellipsis button to display a *Select the reason code for this credit note* pop up screen.





- Click on the *row selector* in front of the *reason code* that you wish to *select* for this *credit note*.
- Click on *Ok*.
- Note: If no codes have not yet been configured, or the code that you need to use has not been set up, then this needs to be added in Static Data: <u>Credit Note Reason</u>.



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• The selected reason code will now populate the Related References panel.



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• If you leave the credit note **as is** and click on Save, it will be credited it **in full**.



- Note: You can also do a <u>partial credit</u> <u>note</u>.
- Click on *Save*.

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- You will return to the *Sales Credit Notes for Call [call number]* listing screen where you can now view the new credit note.
 - Note: Complete the credit note process with the following steps:
 - Credit Note Approval Process
 - Return Stock to Store (if returning stock)



Calls - Add a Credit Note

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Returns	I CN0000100 OFF001	Office Supplies Unlimited New	Damaged Toner	ZAR 1.00	14.00 05 Jan 20	18 01:39:43	M0.001
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Related Topics

Edit Credit Note

Delete a Credit Note

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Credit Note Approval Process

Return Stock to Store (if returning stock)

MNU.122.024

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