

We are currently updating our site; thank you for your patience.

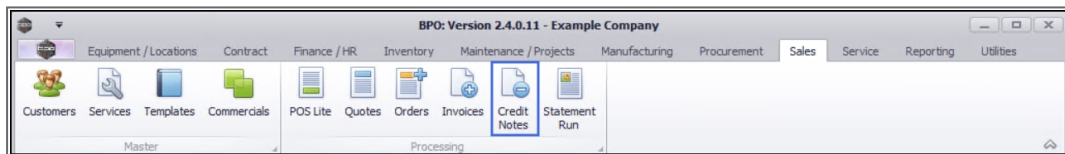
SALES

CREDIT NOTES – PRINT PROCESS

The first time a credit note is printed, it will state: **Tax Credit Note**. Each time thereafter, it will state **Copy - Tax Credit Note**.

When using the 'Email' option to send a Credit Note, it will be emailed via the **BPO Email Service** on the **server** and not from Microsoft Outlook on your desktop.

Ribbon Access: Sales > Credit Notes

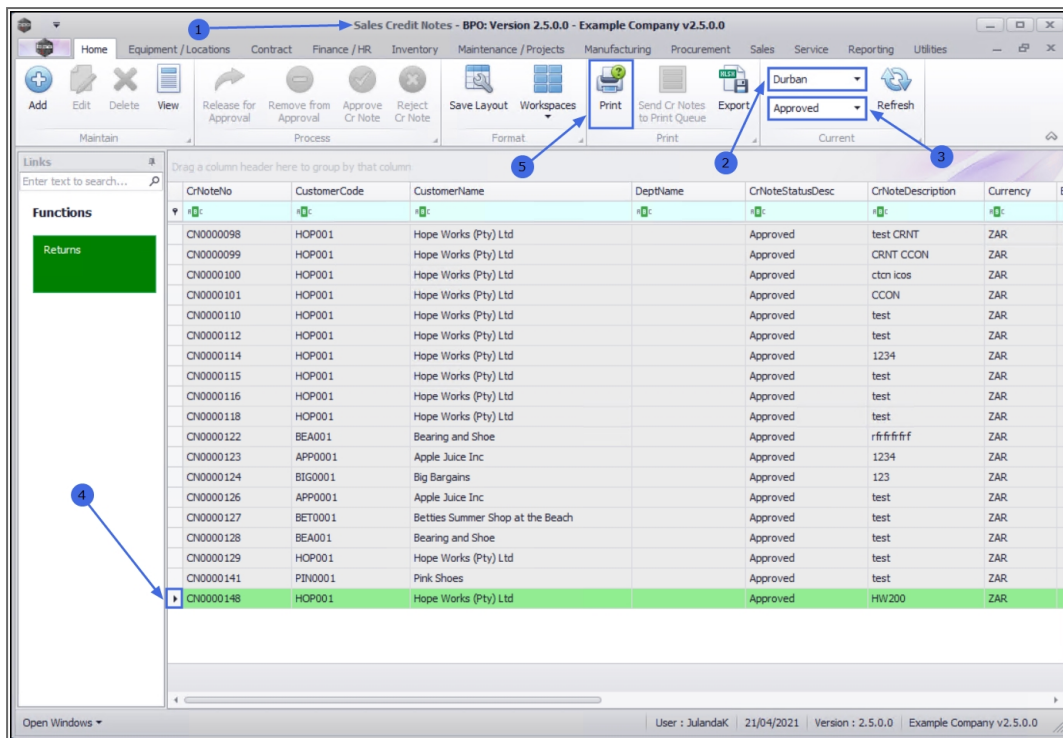


1. The **Sales Credit Notes** listing screen will be displayed.
2. Select the **Site** where the credit note was created.
 - The example has **Durban** selected.
3. Select the **Status** for the credit note you wish to print.






A Credit Note can only be printed when in the **Approved** or **Printed** status.

- The example is printing an **Approved** credit note.
4. Click on the **row** of the Credit Note you wish to print.
 5. Click on **Print**.



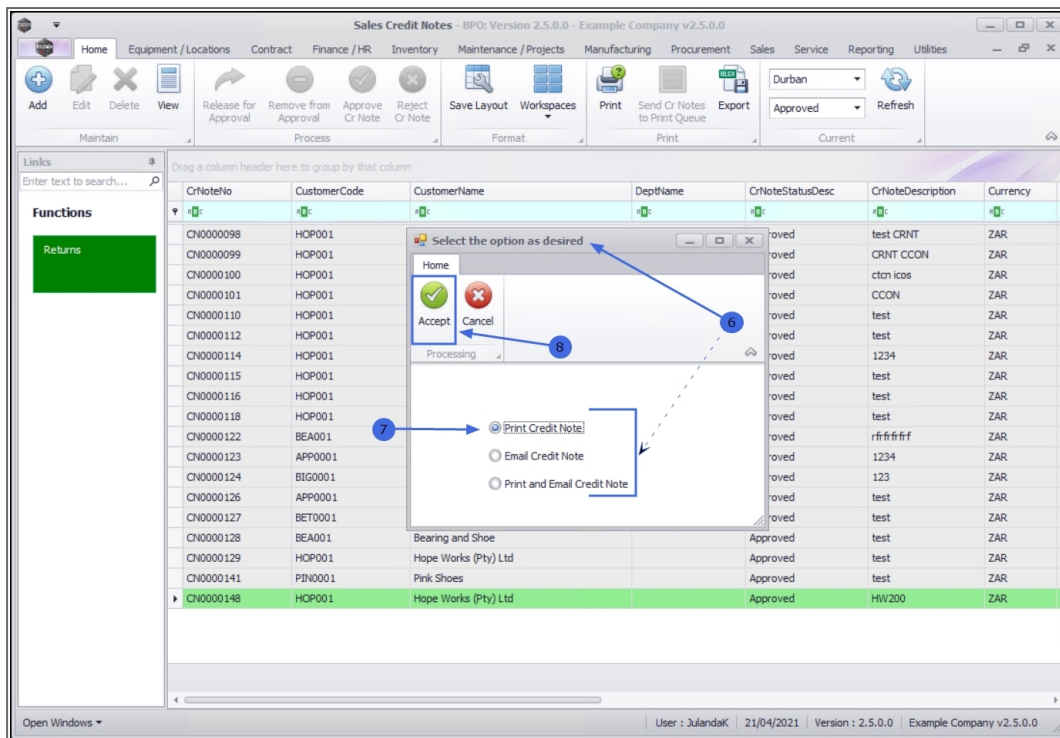
6. The **Select the option as desired** screen will display.

-  **Print Credit Note** will open the credit note in Report Preview to view, print, export or email.
-  **Email Credit Note** will attach documents, add recipients and the system will create a PDF and email the credit note.
-  **Print and Email Credit Note** will display both the Report Preview and Email screen.

PRINT TAX CREDIT NOTE

7. To print the Credit Note, click in the **Print Credit Note** radio button.

8. Click on **Accept**.

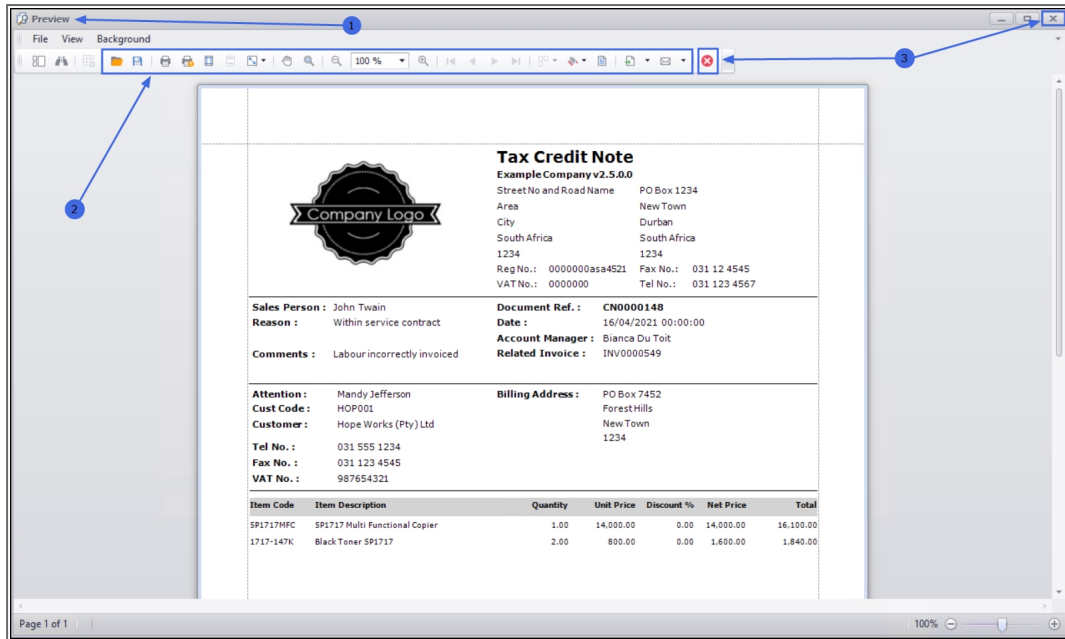


9. The **Report Preview** screen will display.



The header reads 'Tax Credit Note'. The first time a credit note is printed, it will state: Tax Credit Note, each time thereafter, it will state Copy - Tax Credit Note.

10. From the preview screen you can make cosmetic changes to the documents, as well as **Save**, **Zoom**, **Add a Watermark**, **Export** or **Email** the credit note.
11. Click on **Close** to return to the **Sales Credit Notes** screen.



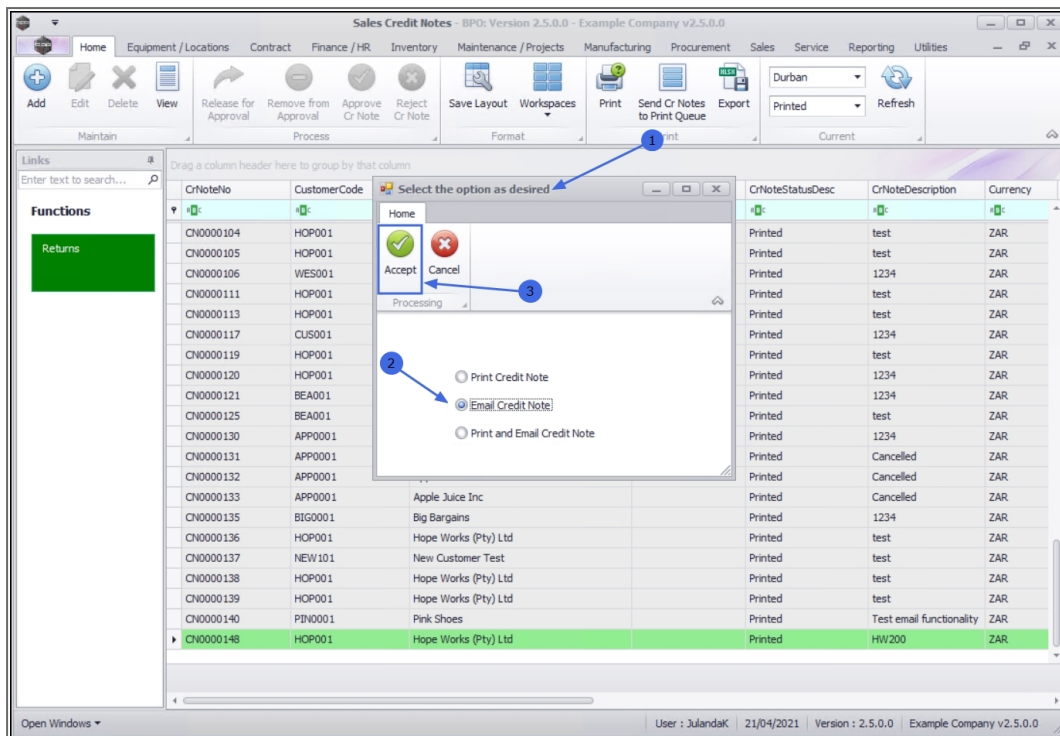
The printed credit note is now available on the **Sales Credit Notes** screen where the **Status** has been set to **Printed**.

PRINT AND EMAIL CREDIT NOTE



If you get an error when trying to email the document, ask your administrator to make sure that the correct shared folder location has been configured in BPO and that you have the relevant folder rights to access the shared folder on the server.

1. From the **Select the option as desired** screen,
2. Click on the **Email Credit Note** radio button.
3. Click on **Accept**.



4. The **Email Sales Credit Note : CN[credit note number]** screen will display for both **Email Credit Note** or **Print and Email Credit Note** options.

EMAIL HEADER

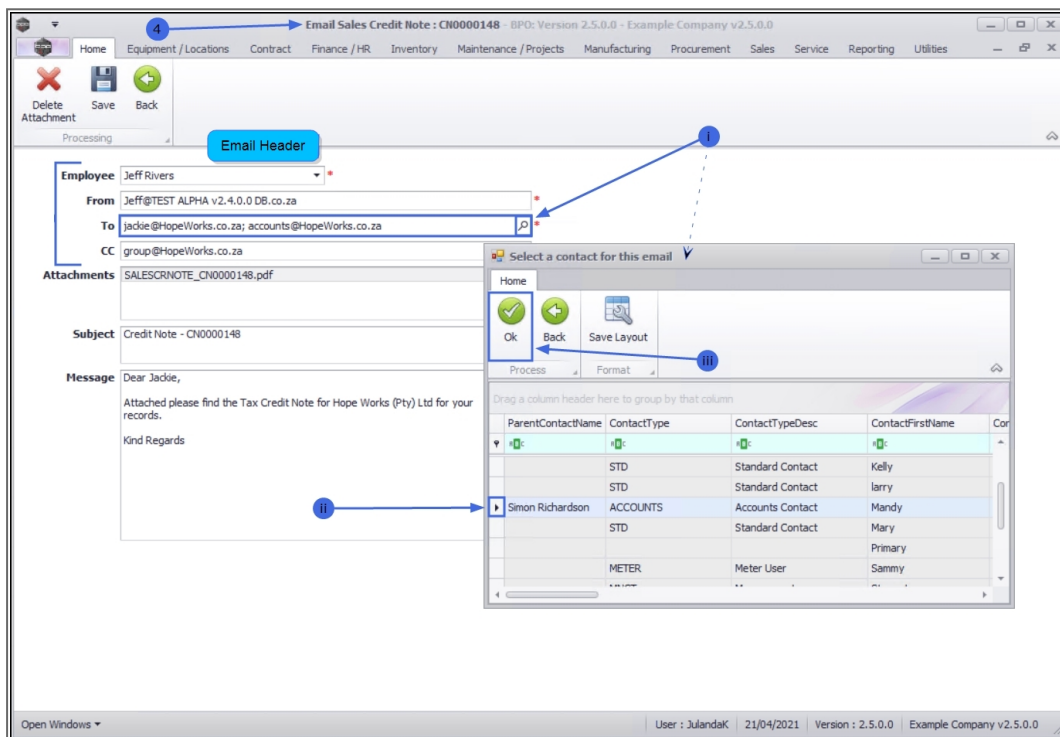
- **Employee:** The name of the employee who is currently logged on will display in the employee field. Click on the drop-down **arrow** to choose an alternative employee name, if required.
- **From:** The email address of the employee selected will display in this field.
- **To:** To add a contact email address;
 - Click on the **search** button to display the **Select a contact for this email** screen.
 - Click on the **row** of the email address of the **Customer Contact** you wish to add.
 - Click on **OK**.

- **CC:** If a group email address or an accounts contact has been set up, then the email address will display here.



Additional email addresses can be added to either **To:** or **CC:** by separating the email address with a [;].

- The example has the accounts email address added to **To:**jackie@HopeWorks.co.za; account-s@HopeWorks.co.za

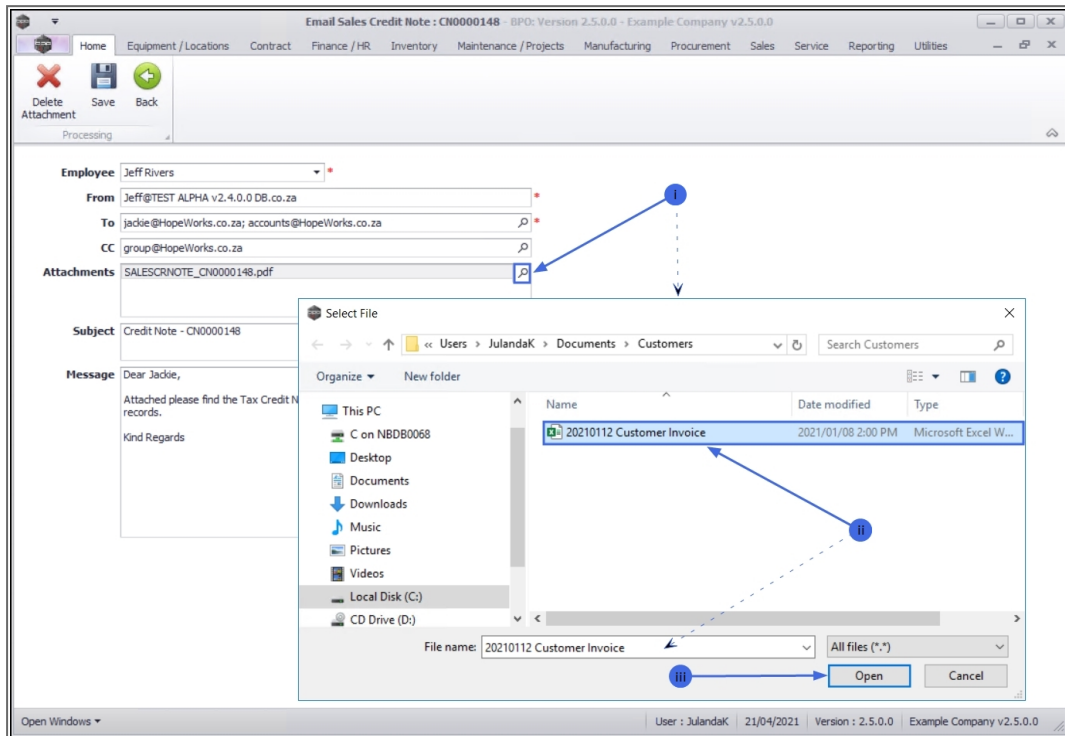


ParentContactName	ContactType	ContactTypeDesc	ContactFirstName
Simon Richardson	ACCOUNTS	Accounts Contact	Mandy
	STD	Standard Contact	Mary
	STD	Standard Contact	Primary
	METER	Meter User	Sammy

ATTACHMENTS

- **Attachments:** BPO will create a PDF of the credit note and attach it automatically.
 - To add additional attachment(s), click on the **search** button in the **Attachments** field to display the **Select File** window.

- ii. You can **browse** to find the file location of the document you wish to attach, then **click** on the file.
- iii. Once you have selected the file, click on **Open**.

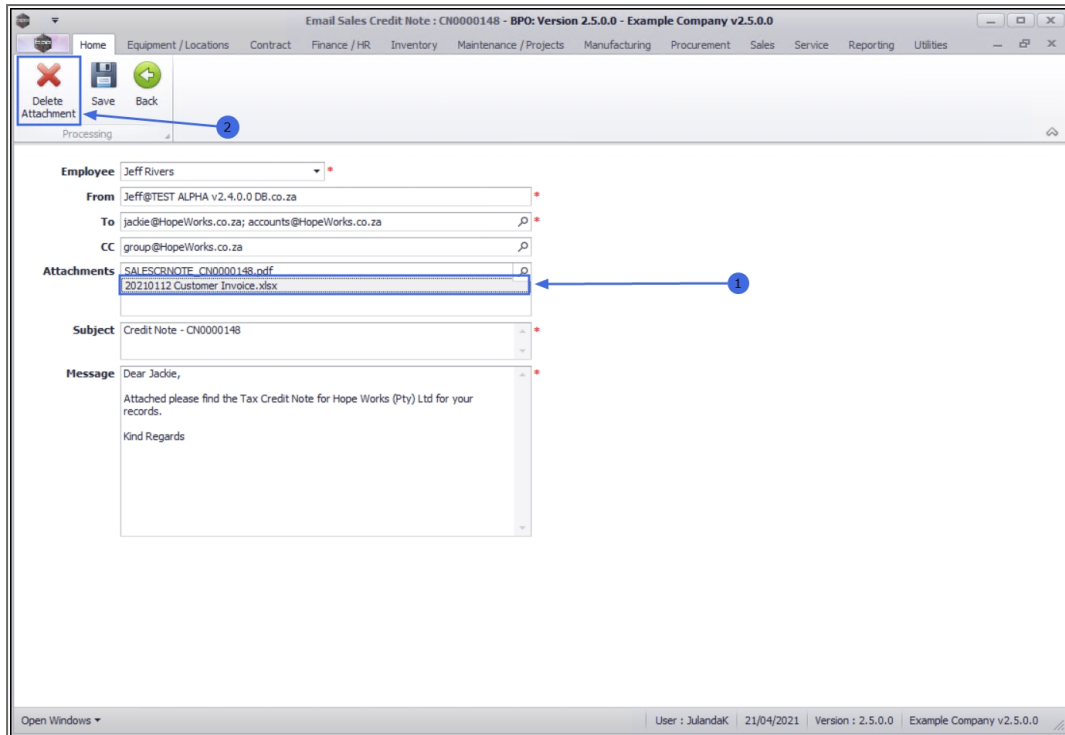


The document has been added as an **Attachment**.

Delete an Attachment

You may choose to delete an obsolete or incorrectly attached document.

1. Click on the **attachment** you wish to remove.
2. Click on **Delete Attachment**.

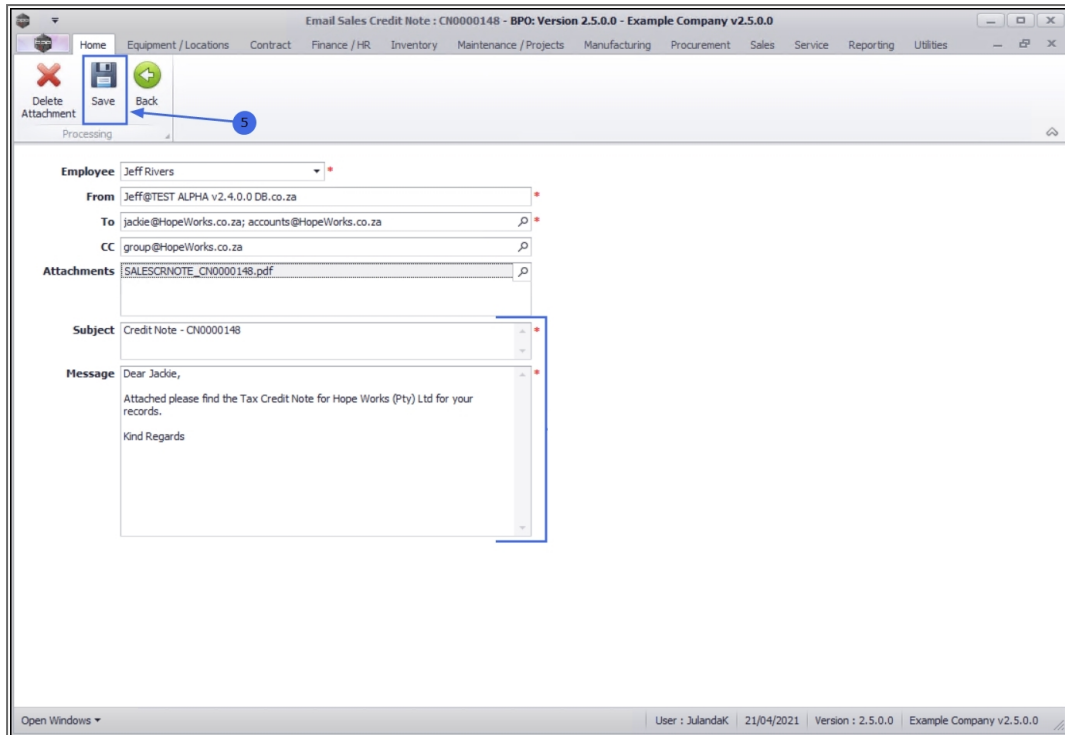


EMAIL SUBJECT AND MESSAGE

- **Subject:** Type the subject line for the email. Remember that the subject is the first reference relating to your email, that the Customer will see.
- **Message:** Type the relevant text for the email.

SAVE EMAIL

5. Once you have completed the email, click **Save**.



SEND CR NOTES TO PRINT QUEUE

An individual or a batch of Credit Notes can be send to the Customer using the **Send Cr Notes to Print Queue** function. This is dependent on the customer's delivery method; Print, Email or Print/Email.

1. From the **Sales Credit Notes** list screen,
2. Select the **Site** where the Credit Notes have been issued.
 - The example has **Durban** selected.
3. Change the **Status** to **Printed**.



You can only send Credit Notes to the Print Queue that have a **Printed** status.

FILTER BY CUSTOMER

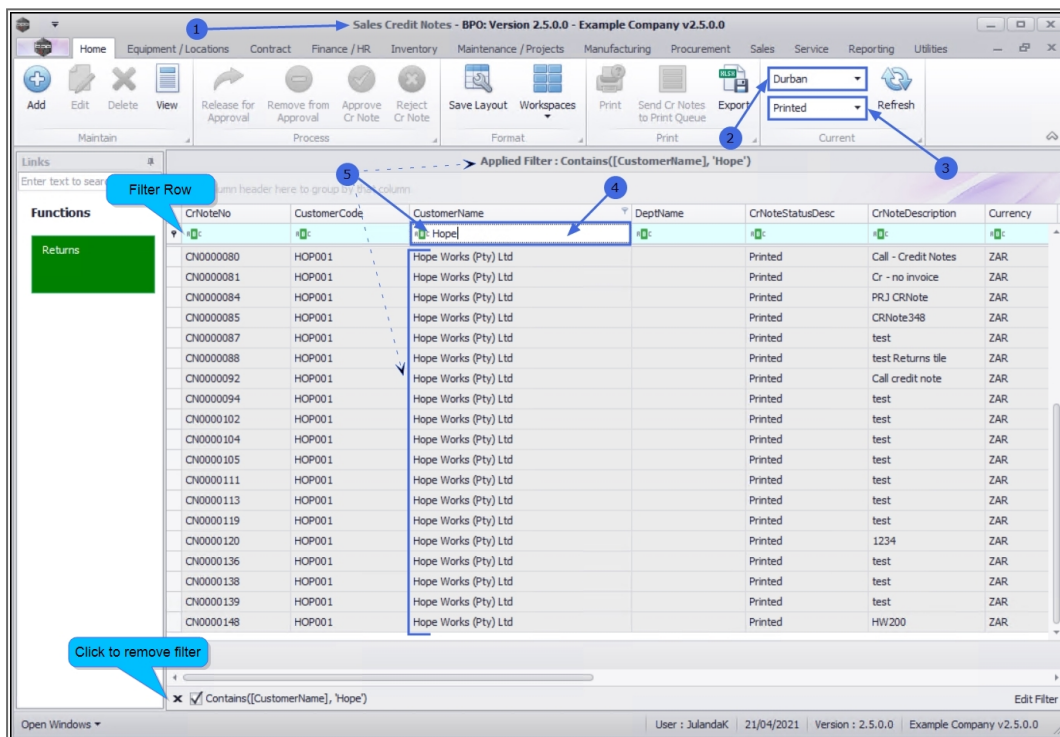
To send credit notes for a **specific customer** to the print queue, you can make use of the **filter** option in the filter row.

4. Click in the **Customer Name** filter field.
5. Start typing the **name** of the **Customer** you wish to work with.



The Credit Notes list will start to filter for the customer as you type.

- The example is **filtering** the Credit Notes for Customer **Hope Works (Pty) Ltd.**



The screenshot shows the 'Sales Credit Notes - BPO: Version 2.5.0.0 - Example Company v2.5.0.0' window. The interface includes a top menu bar with various options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, View, Release for Approval, Remove from Approval, Approve Cr Note, Reject Cr Note, Save Layout, Workspaces, Print, Send Cr Notes to Print Queue, Export, and Refresh. A dropdown menu is open, showing 'Durban' and 'Printed' options. The main area displays a table of credit notes with columns: CrNoteNo, CustomerCode, CustomerName, DepthName, CrNoteStatusDesc, CrNoteDescription, and Currency. The table is filtered to show only credit notes for 'Hope Works (Pty) Ltd'. A blue box highlights the 'CustomerName' column header, and a blue arrow points to the filter field. A blue box also highlights the 'Filter Row' button. A blue box at the bottom left indicates 'Click to remove filter'. The status bar at the bottom shows 'User : JulandaK | 21/04/2021 | Version : 2.5.0.0 | Example Company v2.5.0.0'.

CrNoteNo	CustomerCode	CustomerName	DepthName	CrNoteStatusDesc	CrNoteDescription	Currency
CN0000080	HOP001	Hope Works (Pty) Ltd		Printed	Call - Credit Notes	ZAR
CN0000081	HOP001	Hope Works (Pty) Ltd		Printed	Cr - no invoice	ZAR
CN0000084	HOP001	Hope Works (Pty) Ltd		Printed	PRJ CRNote	ZAR
CN0000085	HOP001	Hope Works (Pty) Ltd		Printed	CRNote348	ZAR
CN0000087	HOP001	Hope Works (Pty) Ltd		Printed	test	ZAR
CN0000088	HOP001	Hope Works (Pty) Ltd		Printed	test Returns tile	ZAR
CN0000092	HOP001	Hope Works (Pty) Ltd		Printed	Call credit note	ZAR
CN0000094	HOP001	Hope Works (Pty) Ltd		Printed	test	ZAR
CN0000102	HOP001	Hope Works (Pty) Ltd		Printed	test	ZAR
CN0000104	HOP001	Hope Works (Pty) Ltd		Printed	test	ZAR
CN0000105	HOP001	Hope Works (Pty) Ltd		Printed	test	ZAR
CN0000111	HOP001	Hope Works (Pty) Ltd		Printed	test	ZAR
CN0000113	HOP001	Hope Works (Pty) Ltd		Printed	test	ZAR
CN0000119	HOP001	Hope Works (Pty) Ltd		Printed	test	ZAR
CN0000120	HOP001	Hope Works (Pty) Ltd		Printed	1234	ZAR
CN0000136	HOP001	Hope Works (Pty) Ltd		Printed	test	ZAR
CN0000138	HOP001	Hope Works (Pty) Ltd		Printed	test	ZAR
CN0000139	HOP001	Hope Works (Pty) Ltd		Printed	test	ZAR
CN0000148	HOP001	Hope Works (Pty) Ltd		Printed	HW200	ZAR

Remove filter

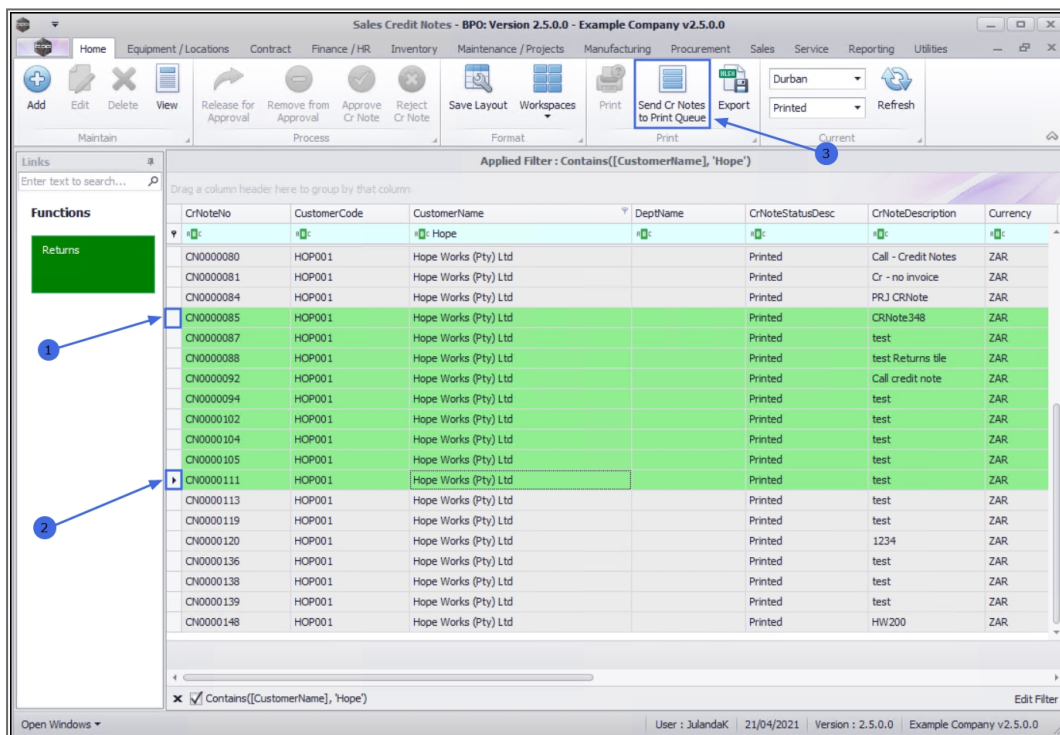
To remove the filter, press the **Backspace** or **Delete** key on your keyboard to remove the text in the filter field or **deselect** the filter option at the bottom of the screen.

The data grid will be updated and all the Sales Credit Notes will be displayed.

SELECT A BATCH OF CREDIT NOTES

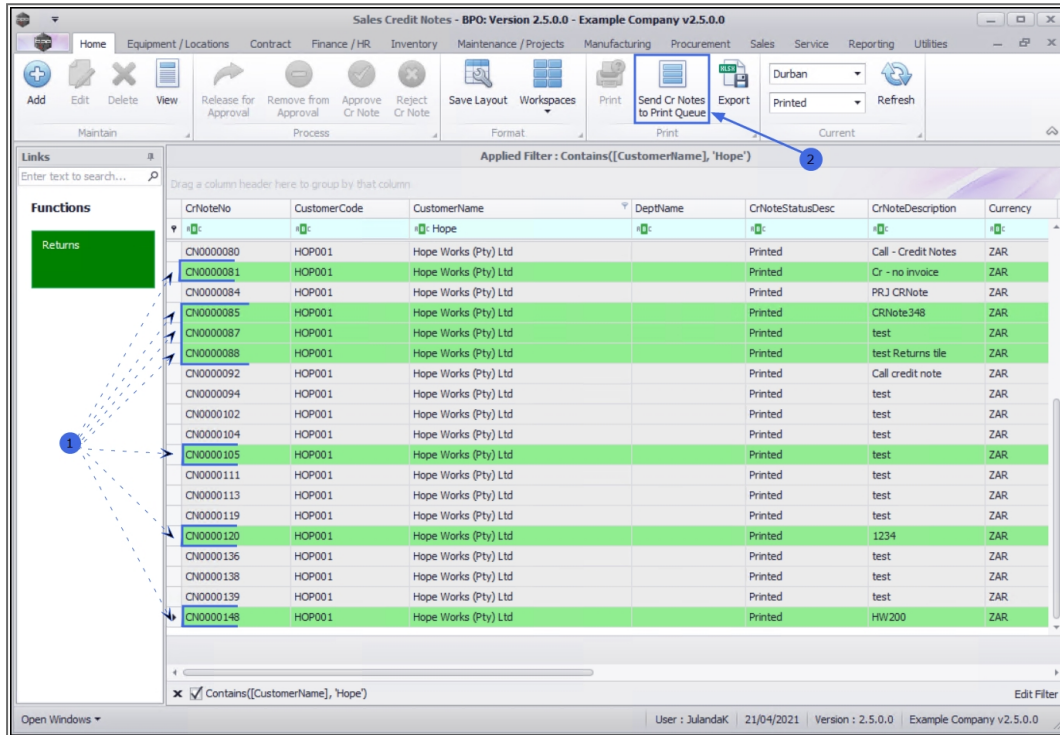
Select a Range

1. Click in the **row** of the **first Credit Note** in the range, to select the row.
2. Hold down the **Shift Key** on your keyboard and click in the row of the **last Credit Note** in the range.
3. Click on **Send Cr Notes to Print Queue**.
4. The Print Queue Processing message will display.



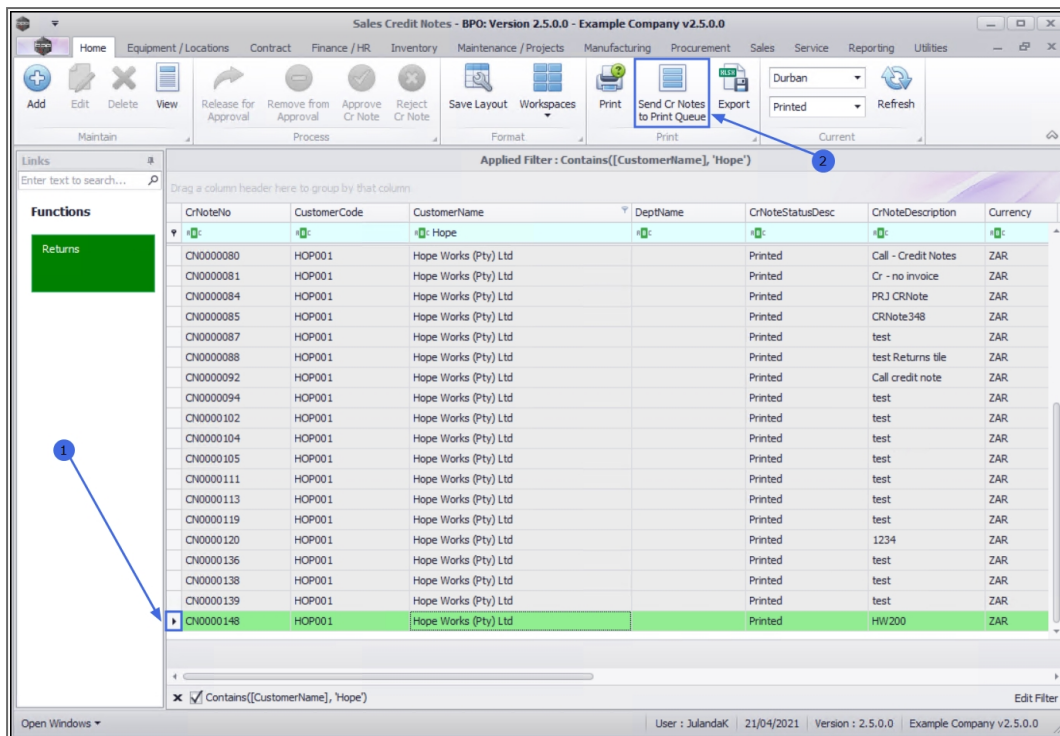
Select Multiple Credit Notes

1. Hold down the **Ctrl** (Control) key on your keyboard and click on the **row** of each Credit Note you wish to include in the batch.
2. Click on **Send Cr Notes to Print Queue**.
3. The [Print Queue Processing](#) message will display.



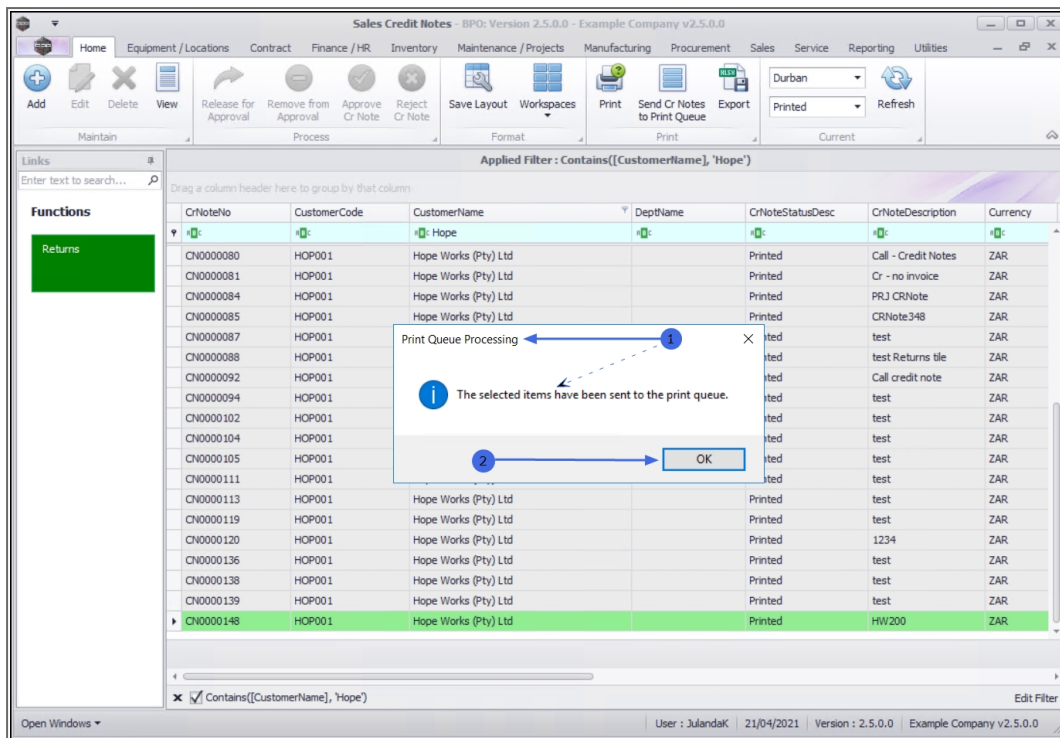
Select a single Credit Note

1. Click on the **row** of the Credit Note you wish to send to the print queue.
2. Click on **Send Cr Notes to Print Queue**.
3. The [Print Queue Processing](#) message will display.



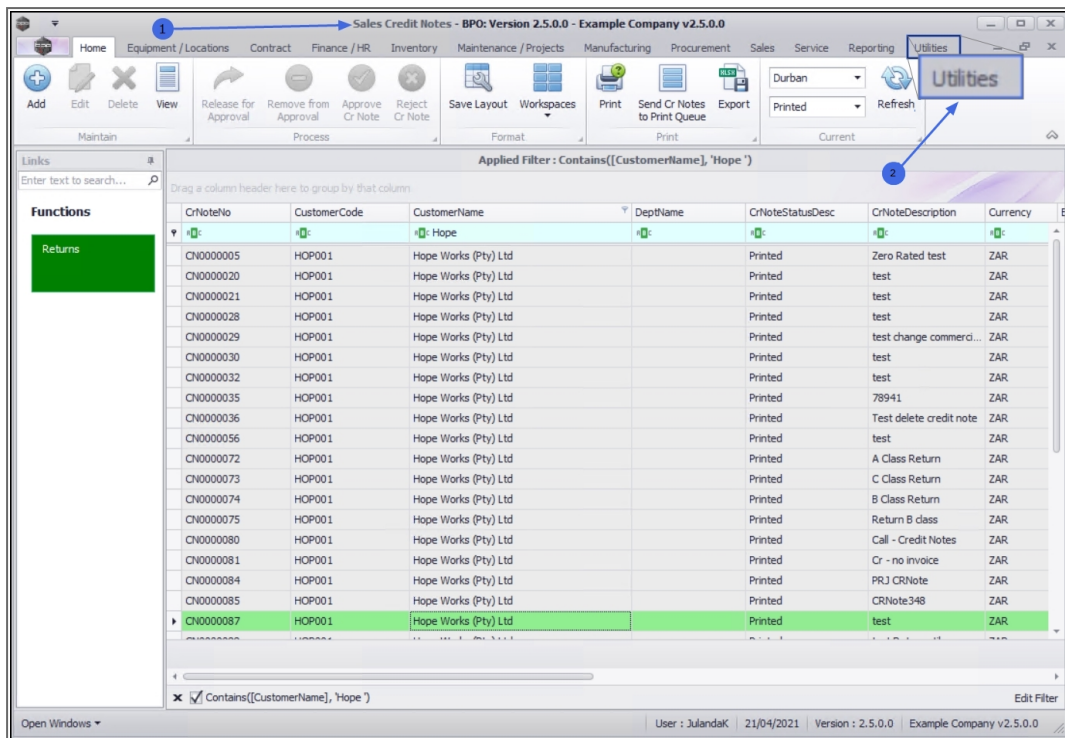
PRINT QUEUE PROCESSING

1. When you receive the **Print Queue Processing** message to confirm;
 - The selected items have been sent to the print queue.
2. Click on **OK**.

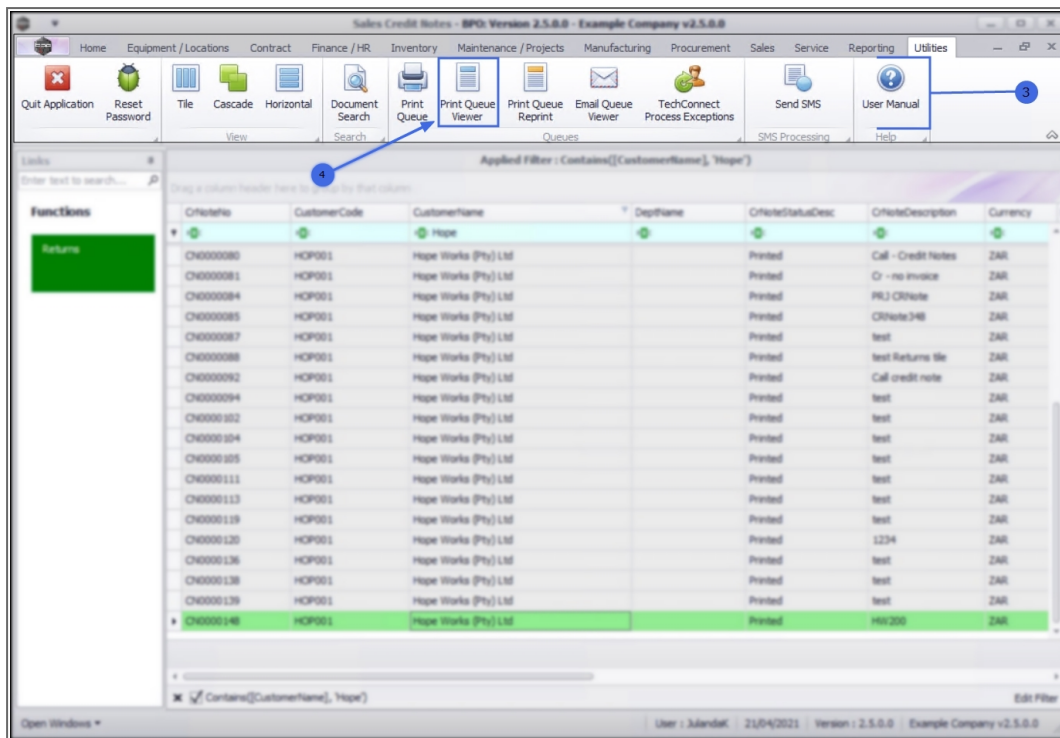


VIEW PRINT QUEUE

1. From the **Sales Credit Notes** listing screen,
2. Click on the **Utilities** ribbon tab.



3. The ribbon bar will change to display the **Utilities ribbon toolbar** will display.
4. Click on **Print Queue Viewer**.



5. The **Print Queue Viewer** list screen will display.
6. The Credit Note you have sent to the Print Queue is listed on the **Print Queue Viewer** listing screen.
7. Click on **Close** to return to the **Sales Credit Notes** listing screen.

Print Queue Viewer - 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 Layout Workspaces Refresh

Format Current

Drag a column header here to group by that column

InvoiceNo	ItemCode	Processed	DateInserted	DatePrinted	CustomerC...	CustomerName	ContactName	PrintMethod	ContactEmail	GroupEmail	SalesInvoic...	BackOn
IN0000904	CTIN	No	06/04/2021	01/01/1900	BIG0001	Big Bargains	Tarryn Snow CUSTOM...	EMAIL	kameshni.pl...	pillaykame1...		
INW0000543	CINW	No	26/02/2021	01/01/1900	BUI0001	Builders Storehouse	Jerry	EMAIL		group@Buil...		
INW0000542	CINW	No	03/03/2021	01/01/1900	BUI0001	Builders Storehouse	Jerry	EMAIL		group@Buil...		
IN0000206	CTIN	No	09/02/2021	01/01/1900	CUS001	Cash Sales Account	Customer Contact	EMAIL		group@Cas...		
CN0000068	CRNT	No	09/02/2021	01/01/1900	CUS001	Cash Sales Account	Customer Contact	EMAIL		group@Cas...		
CN0000117	CRNT	No	09/02/2021	01/01/1900	CUS001	Cash Sales Account	Customer Contact	EMAIL		group@Cas...		
INW0000335	CINW	No	24/02/2021	01/01/1900	DER001	Derton / Technologies	Mike Derton	EMAIL		group@Der...		
CR0000005	CTCN	No	11/02/2021	01/01/1900	HOP001	Hope Works (Pty) Ltd	Mandy Jefferson	PREM	snenhlanhla...		SALESINVO...	SALESB
STC0000002	CTCN	No	11/02/2021	01/01/1900	HOP001	Hope Works (Pty) Ltd	Mandy Jefferson	PREM	snenhlanhla...		SALESINVO...	SALESB
CR0000020	CTCN	No	11/02/2021	01/01/1900	HOP001	Hope Works (Pty) Ltd	Mandy Jefferson	PREM	snenhlanhla...		SALESINVO...	SALESB
CR0000031	CTCN	No	11/02/2021	01/01/1900	HOP001	Hope Works (Pty) Ltd	Mandy Jefferson	PREM	snenhlanhla...		SALESINVO...	SALESB
CN0000148	CRNT	No	21/04/2021	01/01/1900	HOP001	Hope Works (Pty) Ltd	Mandy Jefferson	PREM	snenhlanhla...		SALESINVO...	SALESB
INW0000302	CINW	No	08/02/2021	01/01/1900	SAM001	Samanthas Diner	Samantha Marshall	EMAIL		group@Sam...		
INW0000302	CINW	No	08/02/2021	01/01/1900	SAM001	Samanthas Diner	Samantha Marshall	EMAIL		group@Sam...		
INW0000256	CINW	No	08/02/2021	01/01/1900	SAM001	Samanthas Diner	Samantha Marshall	EMAIL		group@Sam...		
INW0000239	CINW	No	08/02/2021	01/01/1900	SAM001	Samanthas Diner	Samantha Marshall	EMAIL		group@Sam...		
INW0000234	CINW	No	08/02/2021	01/01/1900	SAM001	Samanthas Diner	Samantha Marshall	EMAIL		group@Sam...		
INW0000078	CINW	No	08/02/2021	01/01/1900	SAM001	Samanthas Diner	Samantha Marshall	EMAIL		group@Sam...		
INW0000045	CINW	No	08/02/2021	01/01/1900	SAM001	Samanthas Diner	Samantha Marshall	EMAIL		group@Sam...		
INW0000039	CINW	No	08/02/2021	01/01/1900	SAM001	Samanthas Diner	Samantha Marshall	EMAIL		group@Sam...		

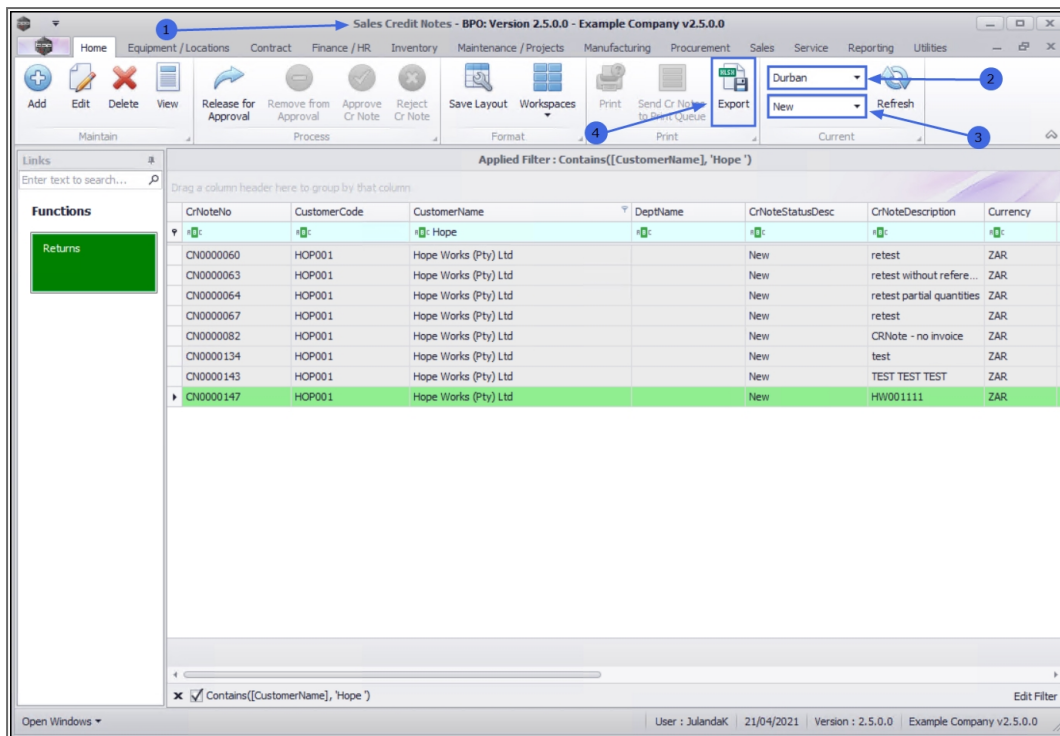
Open Windows

User : JulandaK 21/04/2021 Version : 2.5.0.0 Example Company v2.5.0.0

EXPORT A CREDIT NOTE LIST

The export function allows you to **export** a list of Credit Notes for a selected **Site** and **Status** to a Microsoft Excel Spreadsheet.

1. From the **Sales Credit Notes** list screen,
2. Select the **Site** where the Credit Notes were issued.
 - The example has **Durban** selected.
3. Select the **Status** of the Credit Notes that you wish to export.
 - The example has **New** selected.
4. Click on **Export**.



5. The list of Credit Notes from the **Sales Credit Notes** list screen have been exported to a Microsoft Excel Spreadsheet.



The example has the Customer Name filter in place and therefore only the Credit Notes for Customer Hope Works (Pty) Ltd has been exported. To export all the Credit Notes for the Site and Status, ensure that all filters have been removed.

6. Click on **Close** when done working in Excel to return to the **Sales Credit Notes** list screen in BPO.

Related Topics

- Create and Link a Credit Note
- Edit and Link a Credit Note
- Partial Credit Note

MNU.064.004

