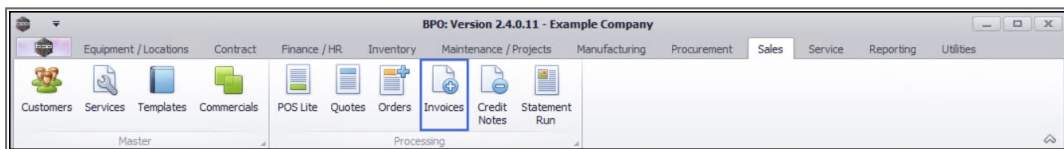# SALES

INVOICES – COMMENT AND REFERENCE

The comment and reference feature on the Sales Invoices listing screen allows you to add or edit a comment and / or reference for a Sales Invoice, irrespective of the Status the Invoice appear in.

Ribbon Access: *Sales > Invoices*

1. The *Sales Invoices* listing screen will display.
2. Select the *Site* where the invoice has been created.
   - The example has *Durban* selected.
3. Click on the *row* of the invoice you wish to Add or Edit a comment and / or reference.
4. Click on *Comment and Reference*.

*Short cut key:* *Right click* to display the *Process* menu list. Click on *Comment and Reference*.
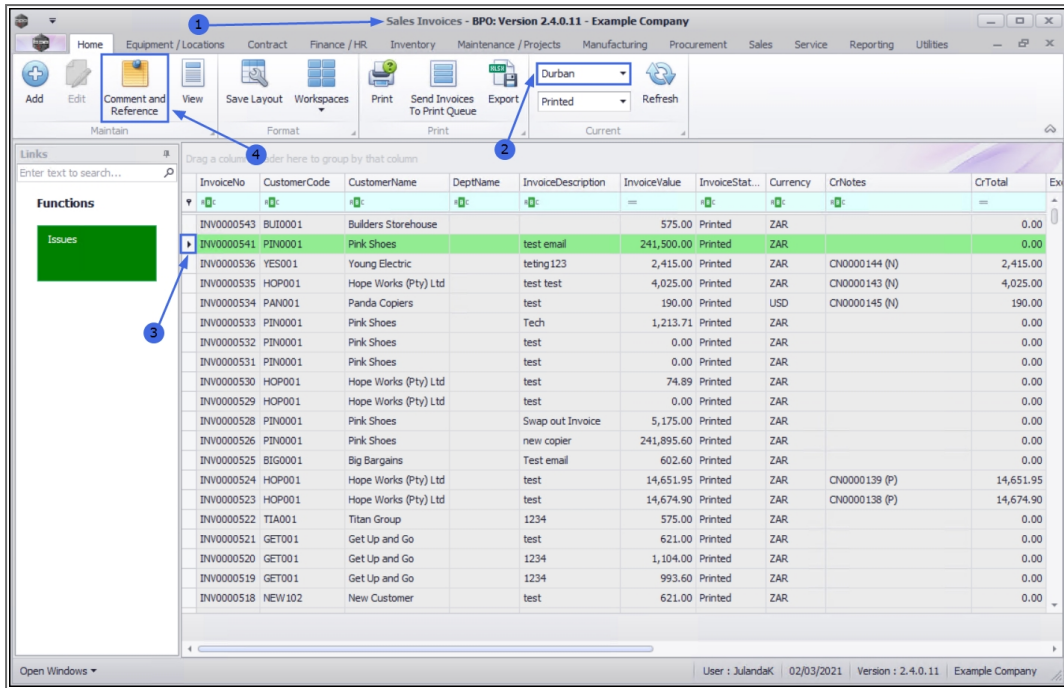
5. The *Invoice No. [invoice number] comment maintenance* screen will display.

6. If a Reference number and comments have already been added for the Invoice, then these fields will be populated.

> 📝 These fields are mandatory fields on this screen and can therefore not be left blank.

- **Reference:** Type the reference number for the Invoice or make the required changes to the existing reference number.
- **Comments:** Type the comments for the Invoice, or make the necessary changes to the comments. The comments will appear on the Invoice.

7. When finished updating the screen, click on *OK* to save the reference and comments to the Invoice, or
  - Click *Back* to discard any changes.
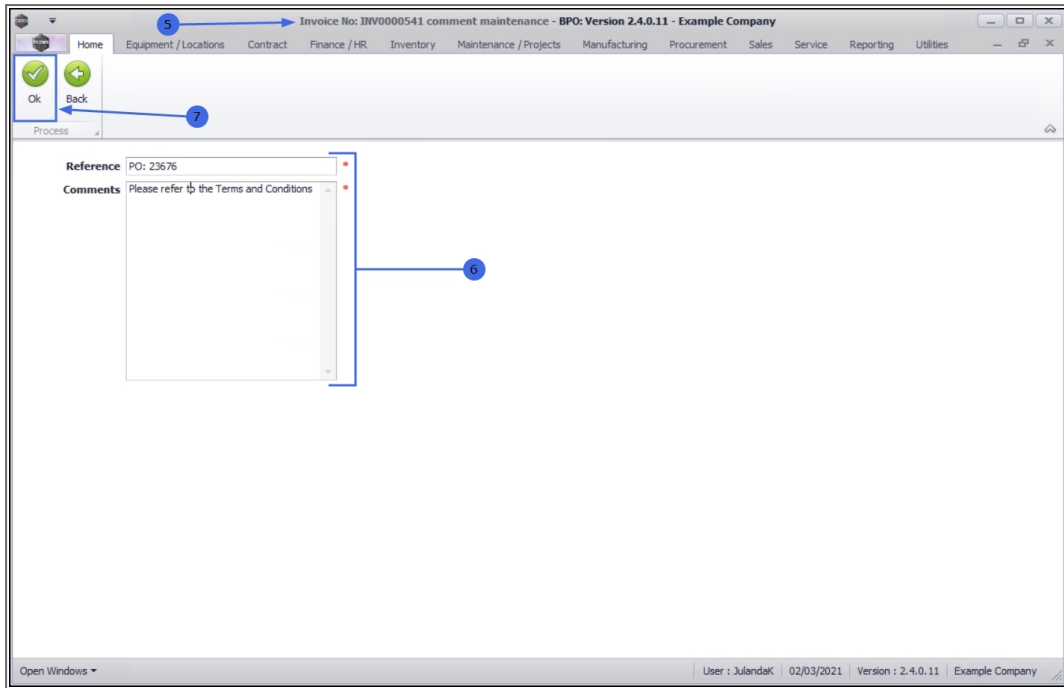
8. You will return to the *Sales Invoices listing* screen.

9. The updated **Reference number** will display in the *Invoice Description* field.

- Use the scroll bar at the bottom of the screen to the view the updated **Comments** in the *Comments* column.

10. Navigate to the <u>View Customer Invoice</u> screen to view the changes and / or additions to the Reference and Comments for the Invoice.

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