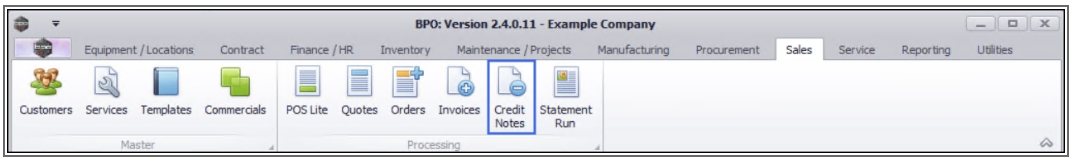
SALES

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.

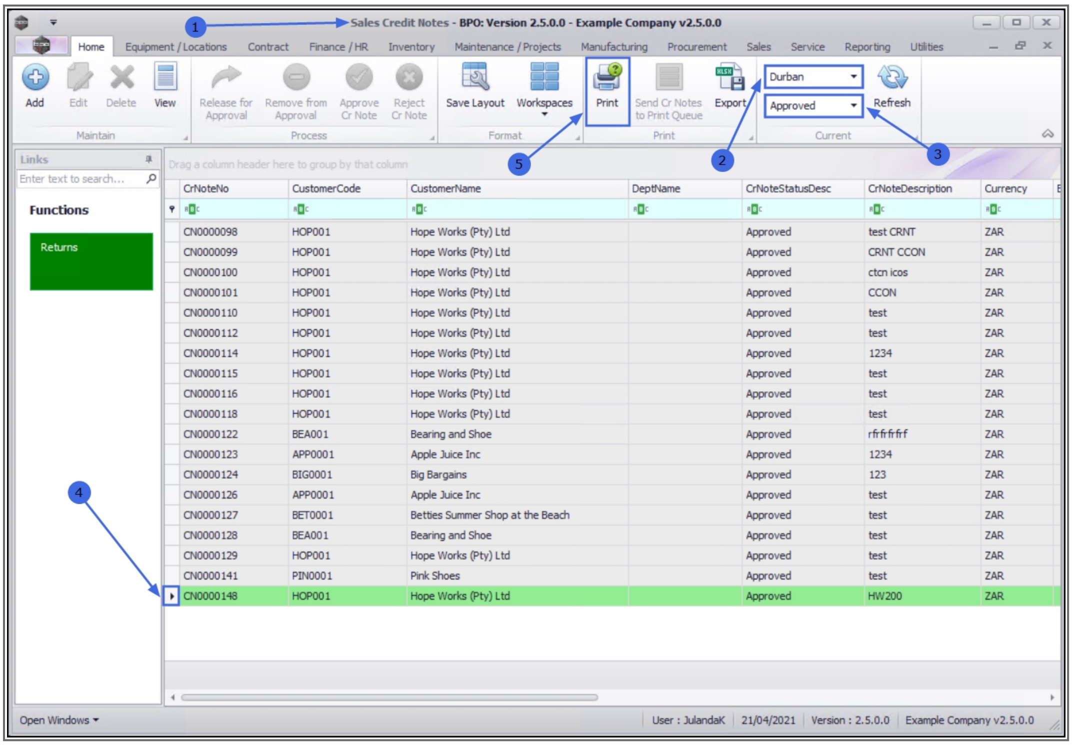
Ribbon Access: *Sales > Credit Notes*



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.

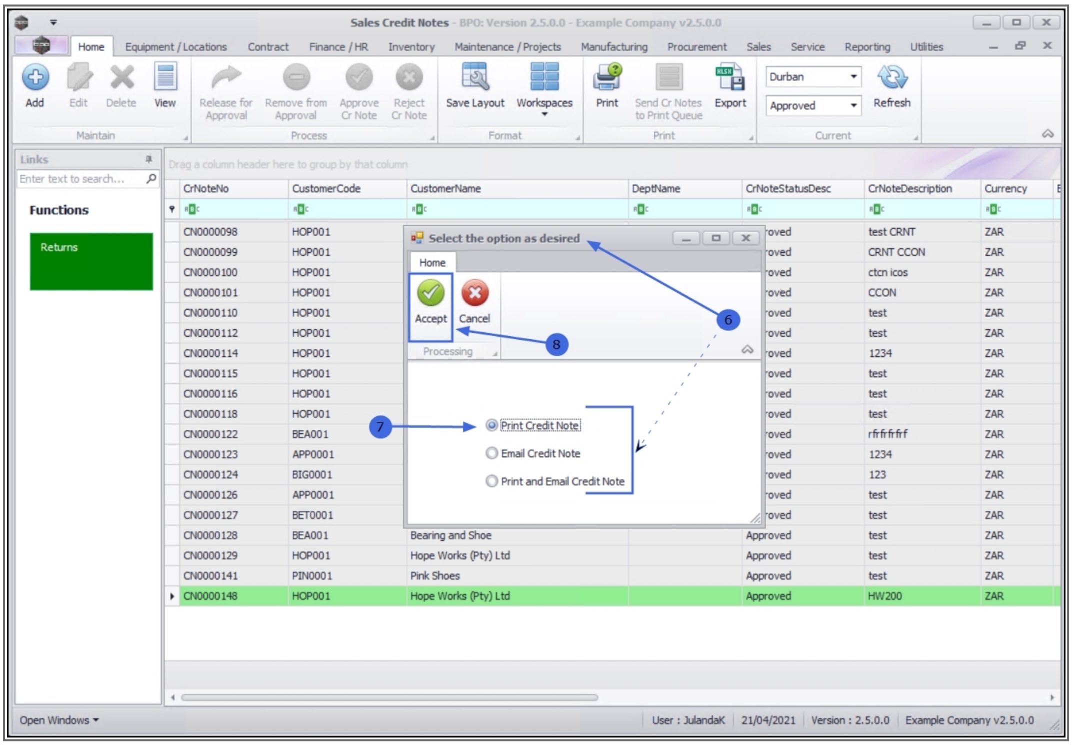
    - The example is printing an Approved credit note.
4. Click on the ***row*** of the Credit Note you with to print.
5. Click on ***Print***.



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

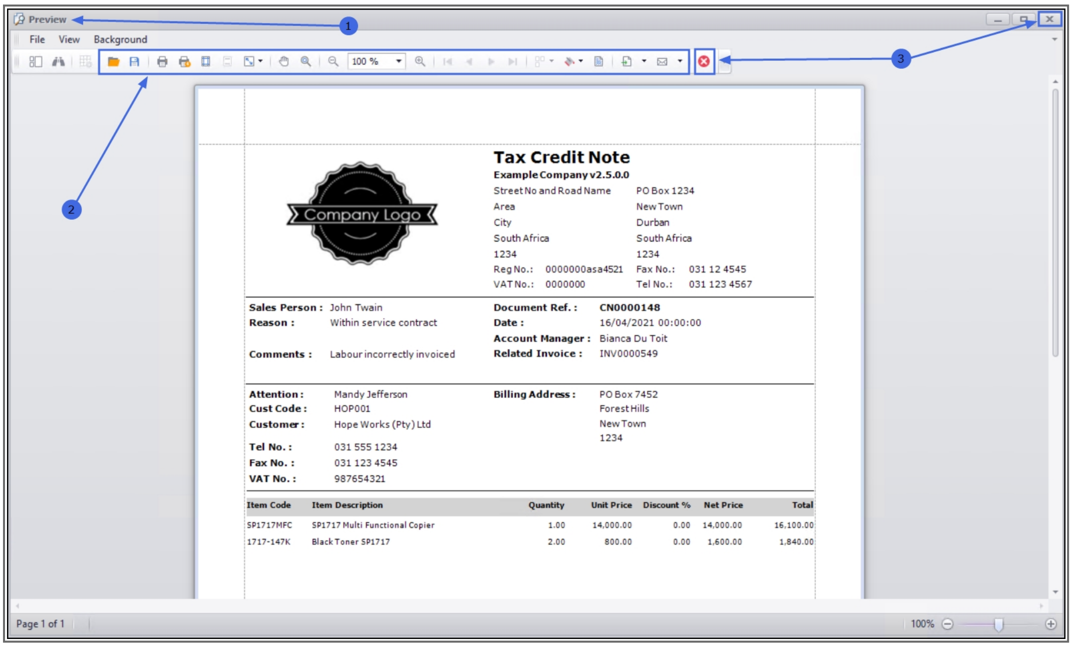
7. To print the Credit Note, click in the ***Print Credit Note*** radio button.
8. Click on ***Accept***.



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.

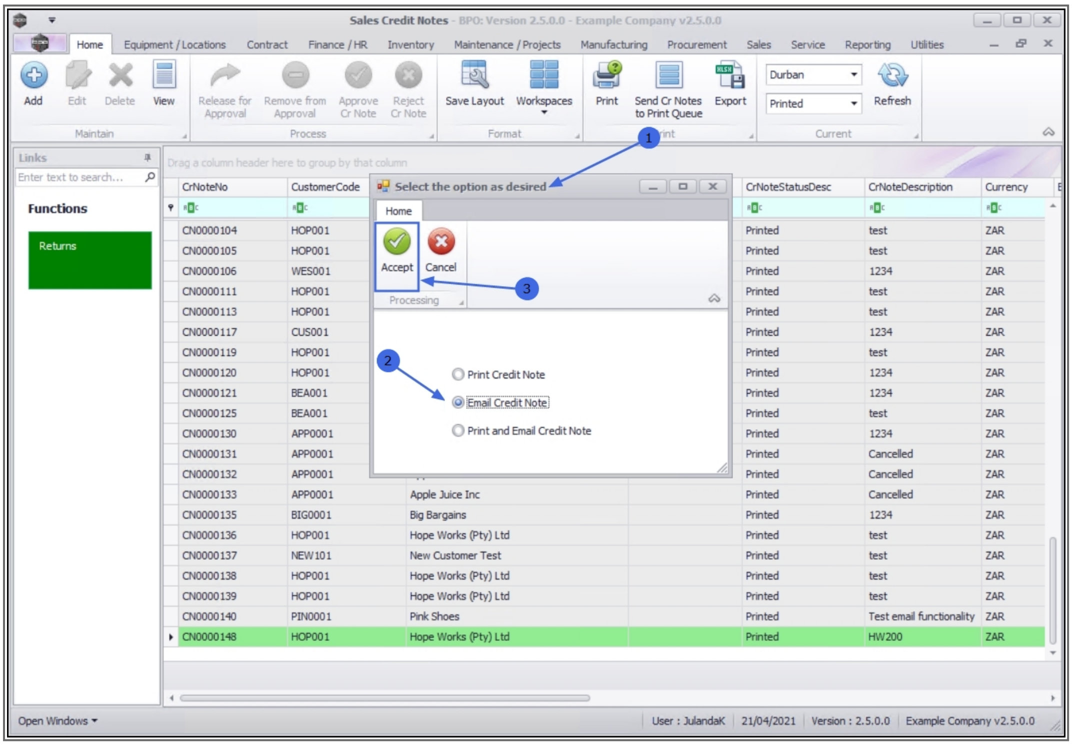


The printed credit note is now available on the ***Sales Credit Notes*** screen where the ***Status*** has been set to ***Printed***.

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.

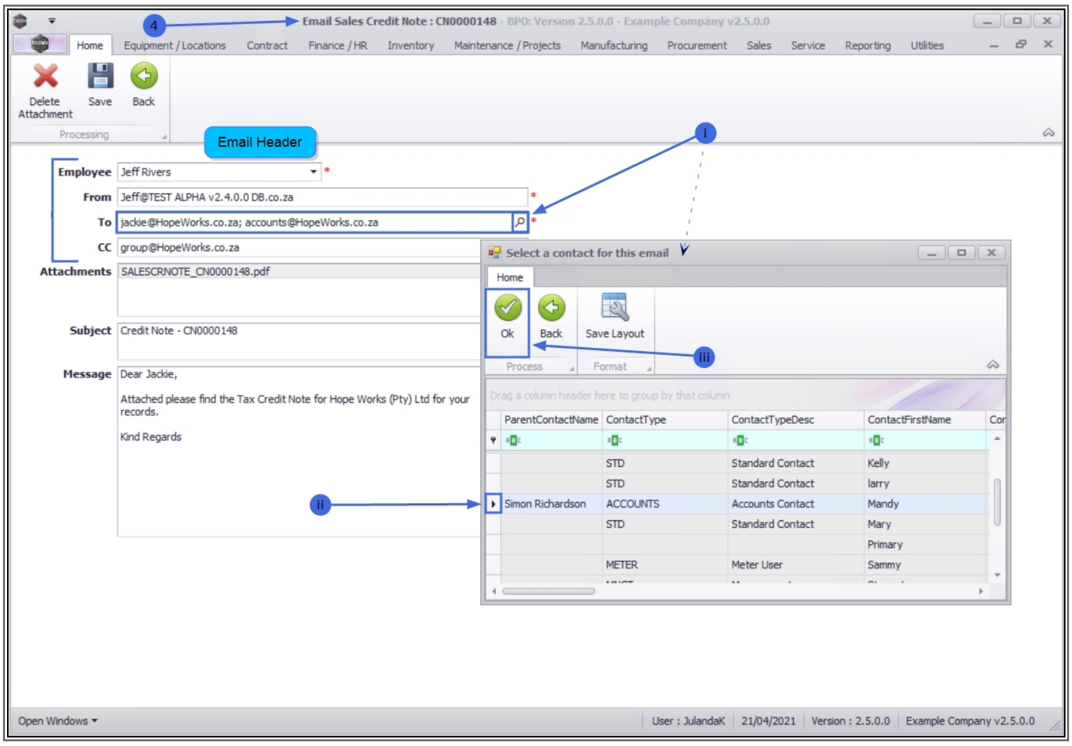
EMAIL HEADER

- **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;
    - i. Click on the ***search*** button to display the ***Select a contact for this email*** screen.
    - ii. Click on the ***row*** of the email address of the ***Customer Contact*** you wish to add.
    - iii. 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; accounts@HopeWorks.co.za*

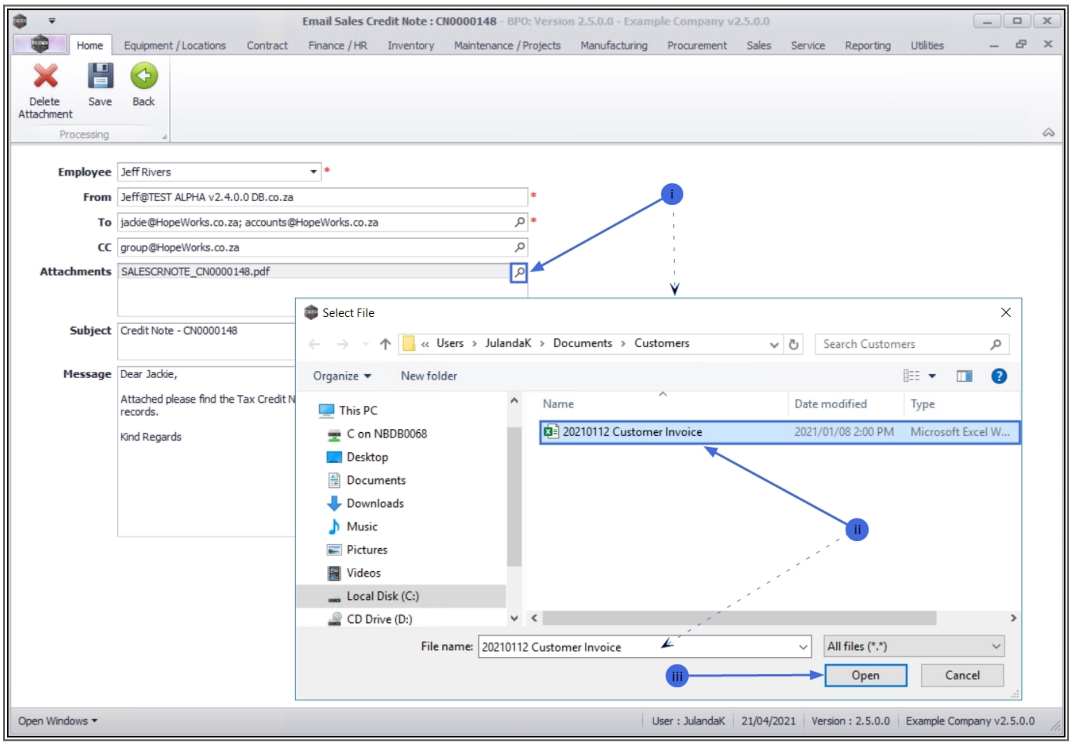


ATTACHMENTS

- **Attachments:** BPO will create a PDF of the credit note and attach it automatically.
  i. 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***.

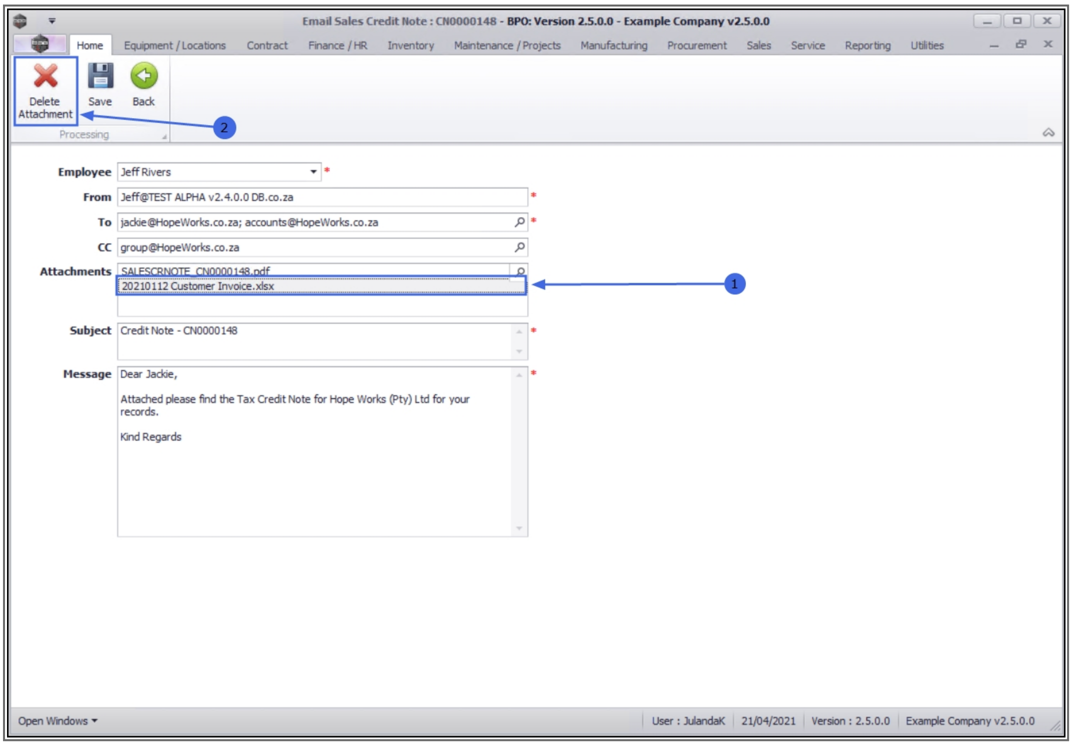


The document has been added as an ***Attachment***.

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***.

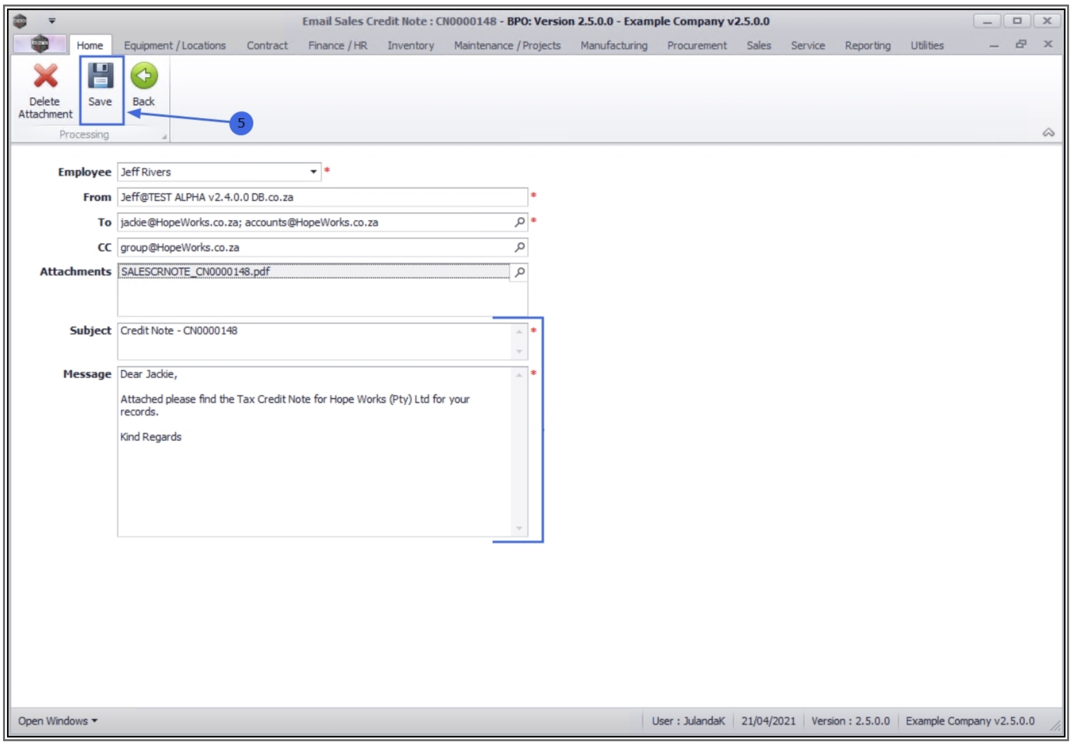


EMAIL SUBJECT AND MESSAGE

- **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.

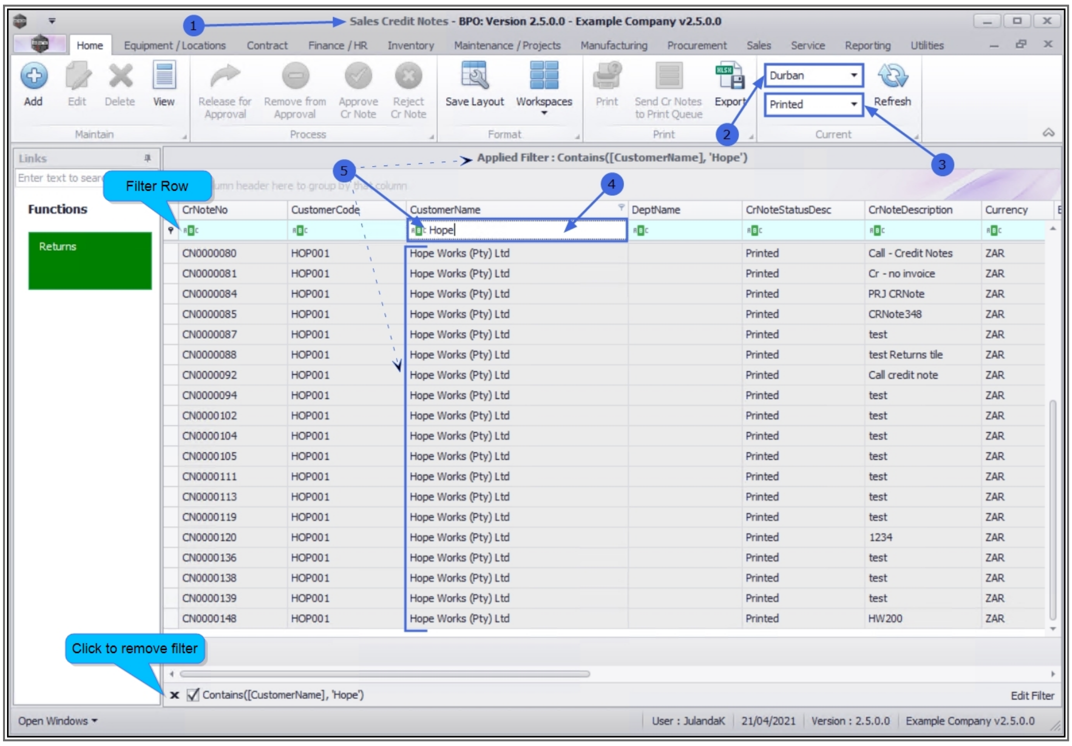
FILTER BY CUSTOMER

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***.



Remove filter

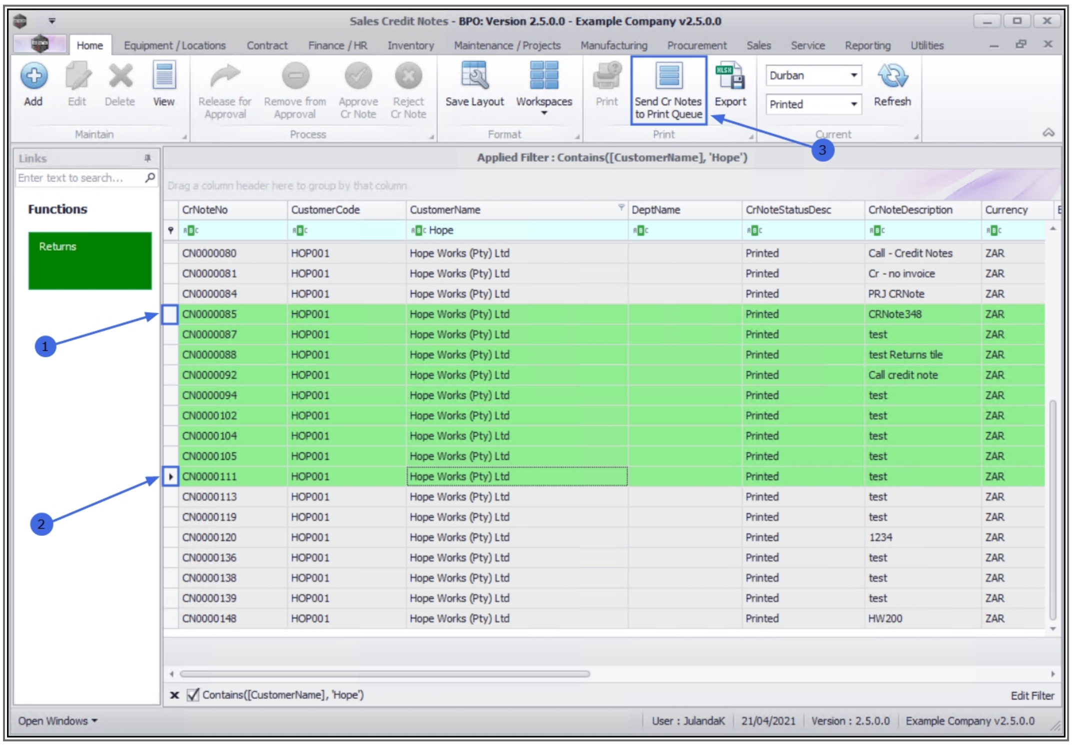
To remove the filter, press the ***Backspace*** or ***Delete*** key on your keyboard to remove the text in the filter field or ***deselect*** the filter option at the bottom of the screen.

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

SELECT A BATCH OF CREDIT NOTES

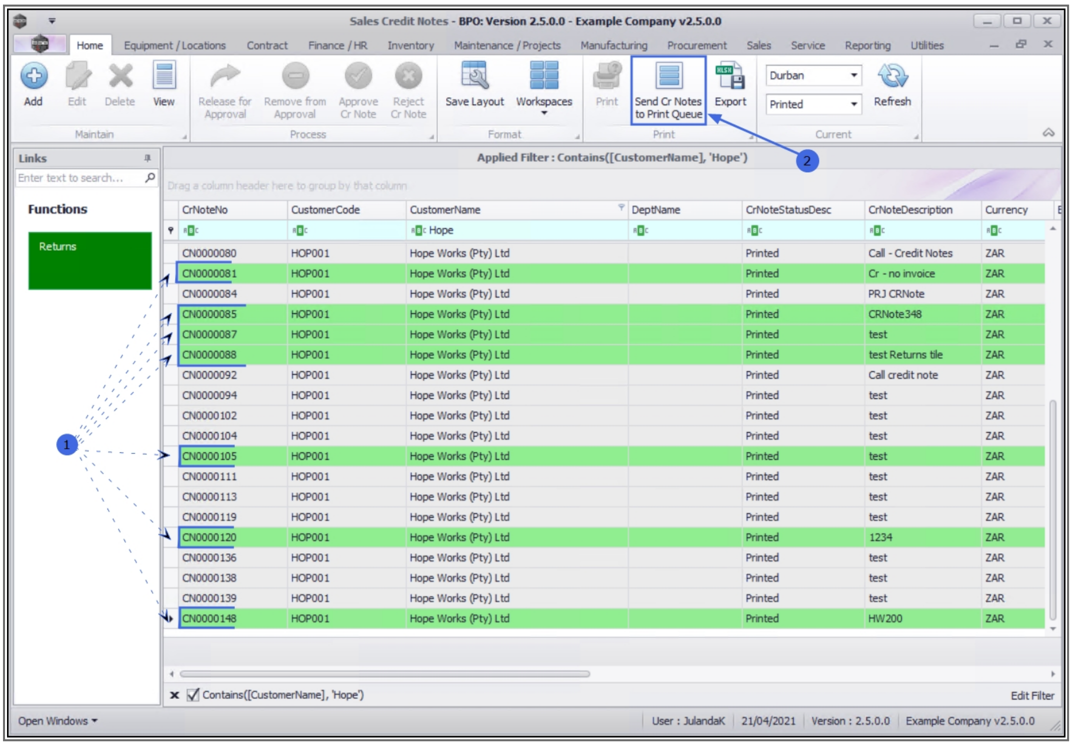
Select a Range

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.



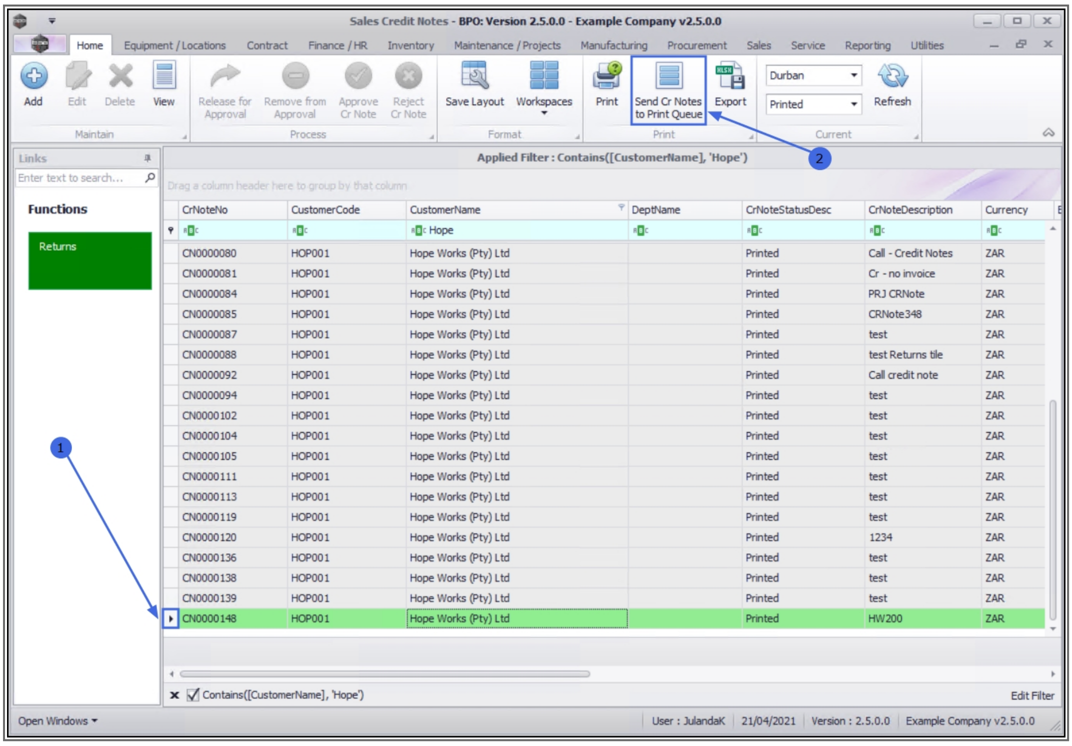
Select Multiple Credit Notes

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.



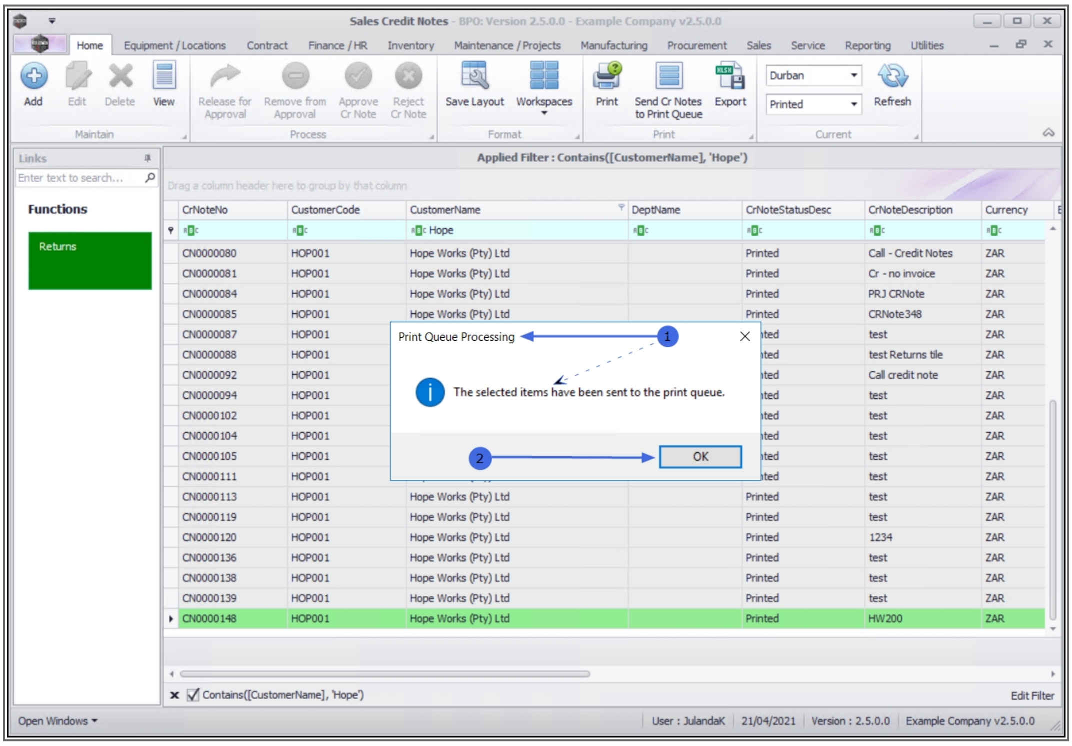
Select a single Credit Note

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.



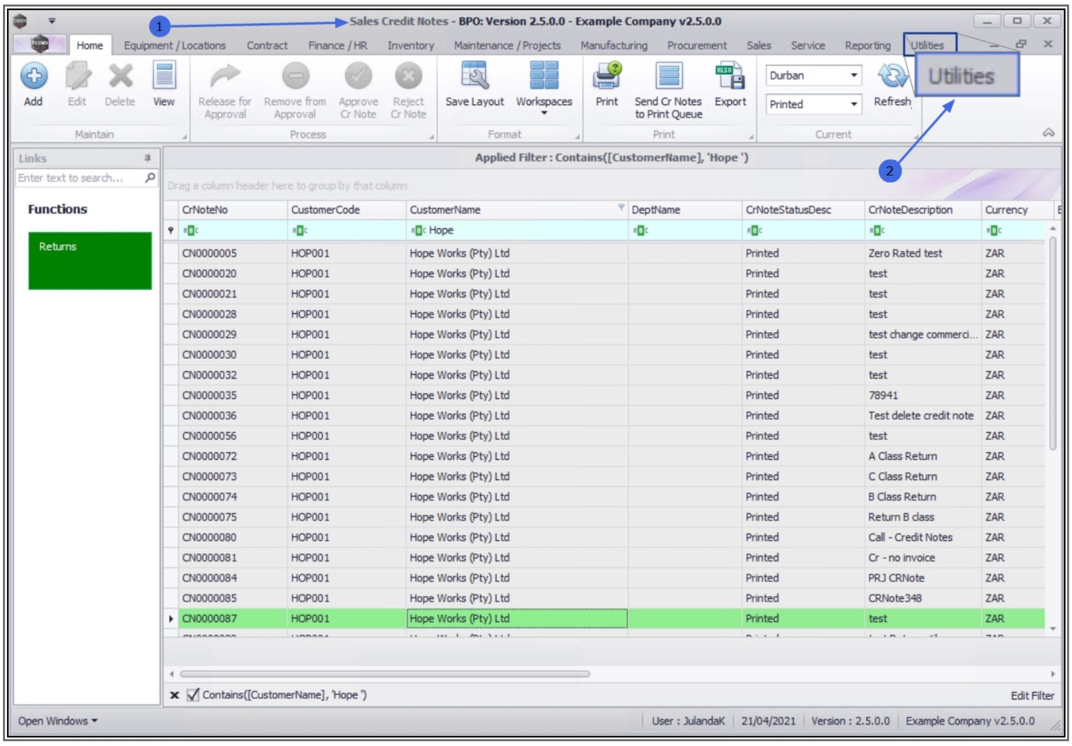
PRINT QUEUE PROCESSING

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***.

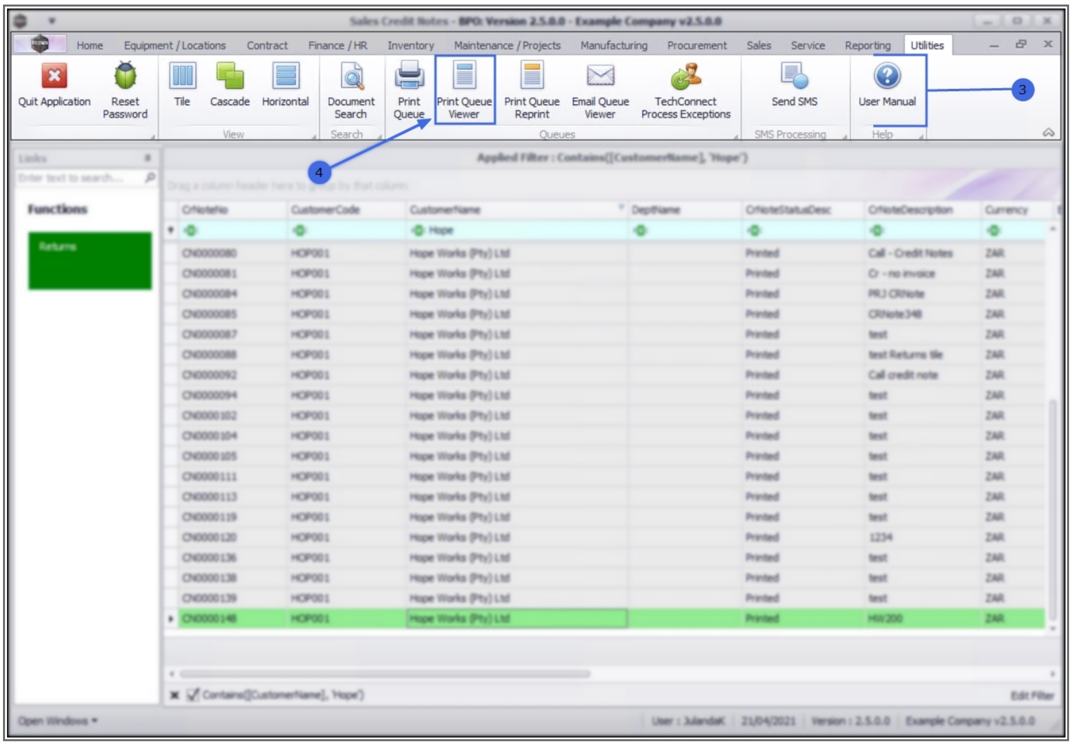


VIEW PRINT QUEUE

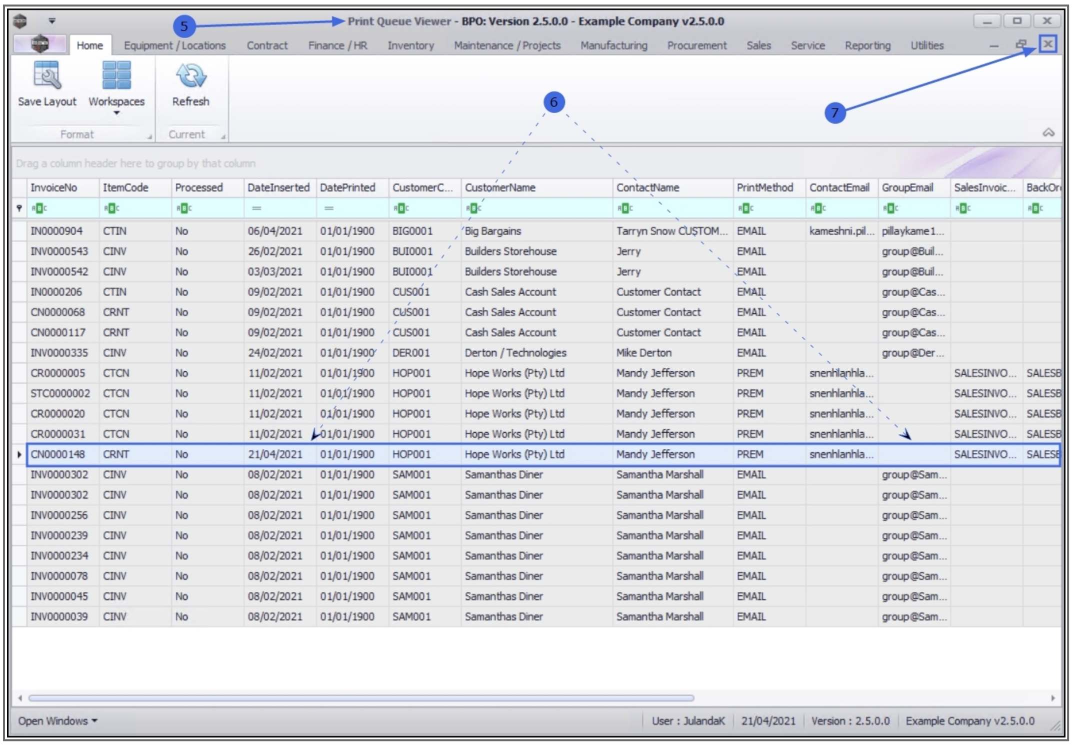
1. From the ***Sales Credit Notes*** listing screen,
2. Click on the ***Utilities*** ribbon tab.



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



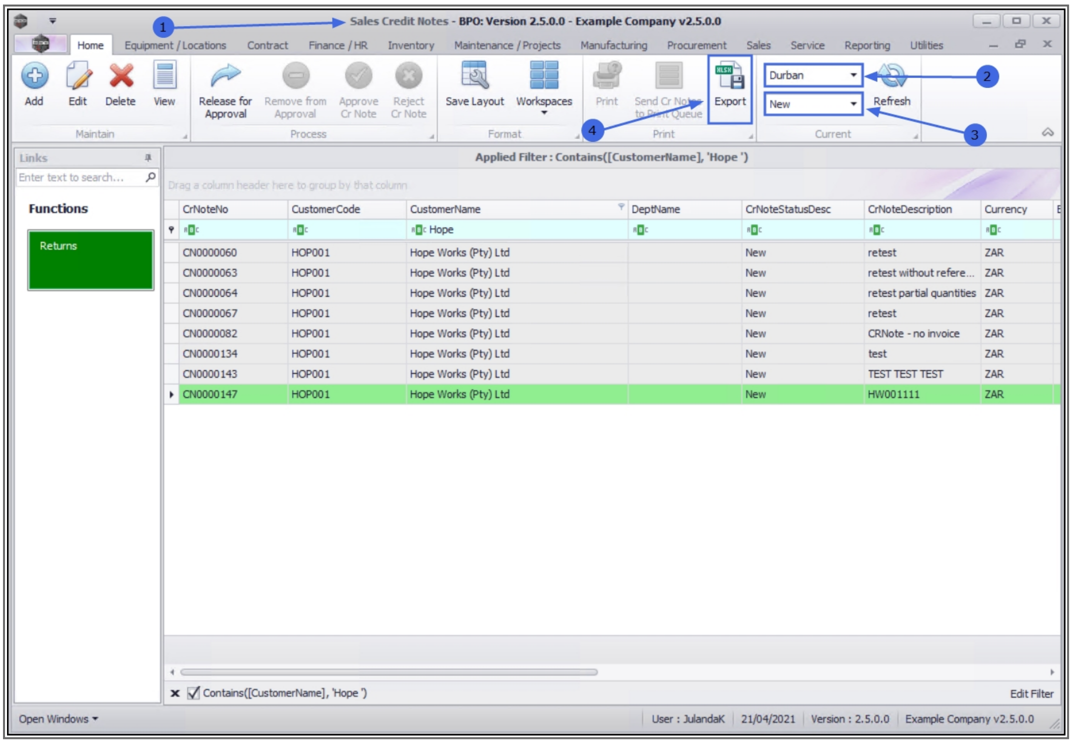
5. The ***Print Queue Viewer*** list screen will display.
6. The Credit Note you have sent to the Print Queue is listed on the ***Print Queue Viewer*** listing screen.
7. Click on ***Close*** to return to the ***Sales Credit Notes*** listing screen.



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.

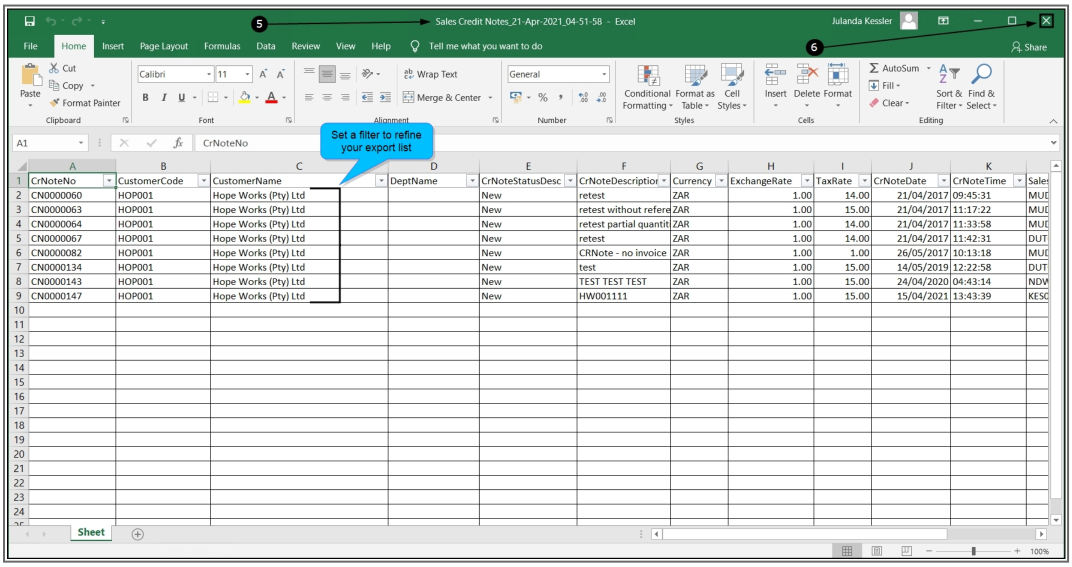
1. From the ***Sales Credit Notes*** list screen,
2. Select the ***Site*** where the Credit Notes were issued.
    - The example has ***Durban*** selected.
3. Select the ***Status*** of the Credit Notes that you wish to export.
    - The example has ***New*** selected.
4. Click on ***Export***.



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