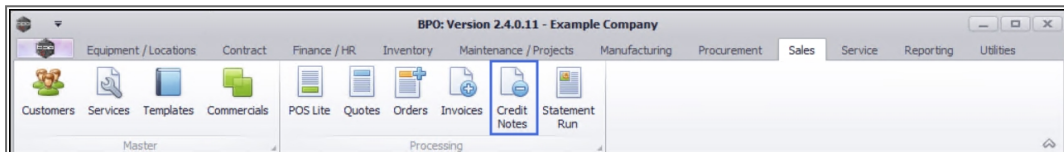


SALES

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**.

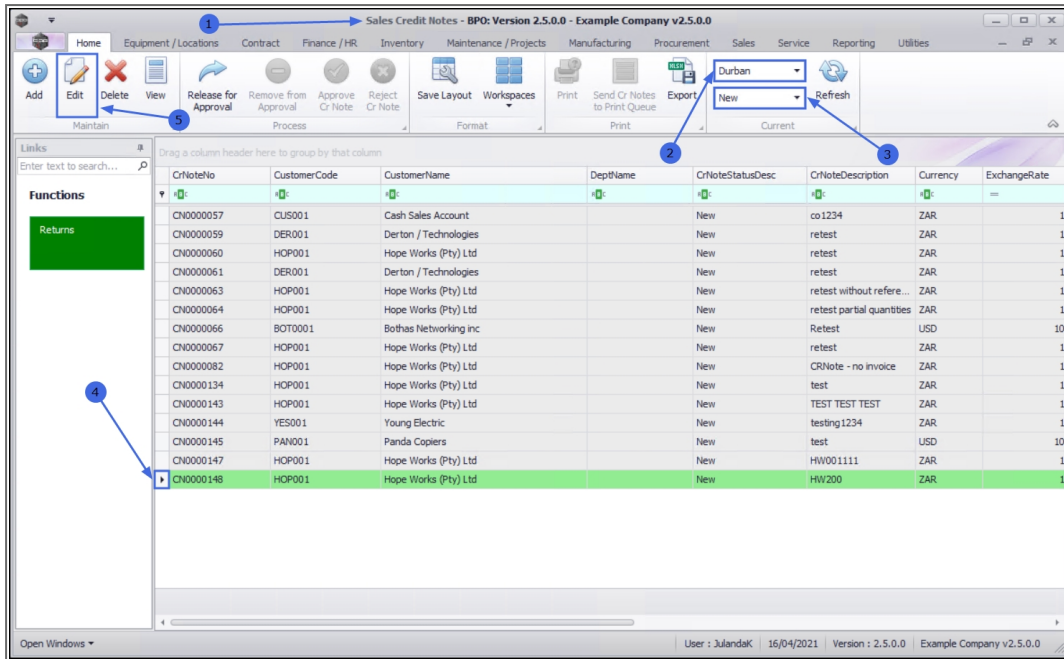


A Credit Note can only be edited in the **New** status.

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.

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

SuppressOnPrint	ItemType	ItemCode	ItemDescription	CrNoteLineDescription	BatchSerialNo	WarehouseName	Quantity	UnitCost	Markup	Discount	ItemPrice
	Parts	SP1717MFC	SP1717 Multi Functional Copier	SP1717 Multi Functional Copier		Main Warehouse	1.000	0.000	0.000	0.000	14,000.00
	Parts	1717-147K	Black Toner SP1717	Black Toner SP1717		Main Warehouse	2.000	0.000	0.000	0.000	800.00
	Labour	ITTECH	IT Technician	IT Technician			1.000	0.000	0.000	0.000	177.00

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

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

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

SuppressOnPrint	ItemType	ItemCode	ItemDescription	CrNoteLineDescription	BatchSerialNo	WarehouseName	Quantity	UnitCost	Markup	Discount	ItemPrice
	Parts	SP1717MFC	SP1717 Multi Functional Copier	SP1717 Multi Functional Copier		Main Warehouse	1.000	0.000	0.000	0.000	0.00
	Parts	1717-147K	Black Toner SP1717	Black Toner SP1717		Main Warehouse	2.000	0.000	0.000	0.000	0.00

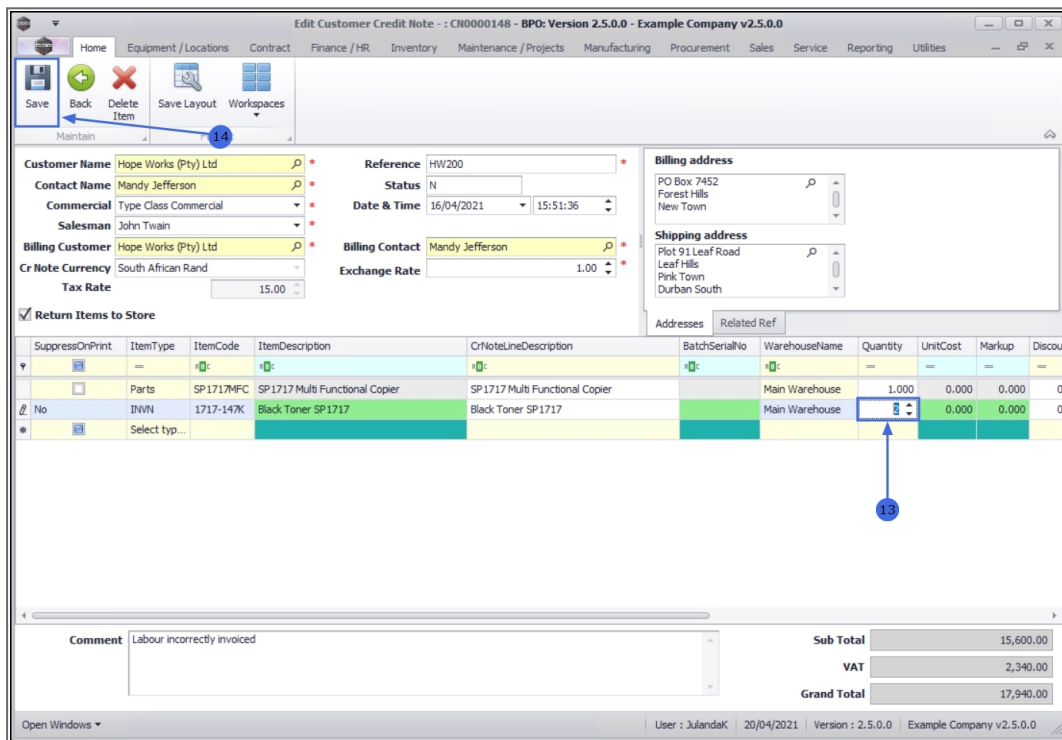
Sub Total: 15,600.00
VAT: 2,340.00
Grand Total: 17,940.00

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**.



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

