

# **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*.



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6. The *Edit Customer Credit Note - CN[credit note number]* screen will be displayed.

#### **CREDIT AN ITEM**

- 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.



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

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#### **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*.

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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
- <u>Credit Note Print Process</u>

MNU.064.005