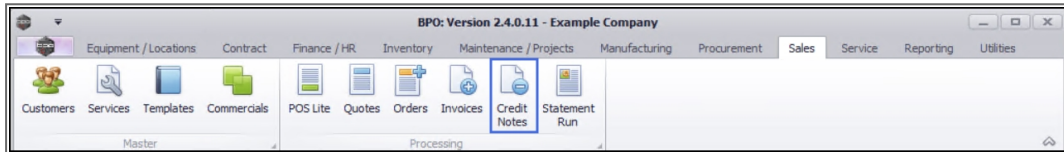


SALES

CREDIT NOTES – RELEASE FOR APPROVAL

Ribbon Access: *Sales > Credit Notes*



1. The **Sales Credit Notes** listing screen will be displayed.
2. Select the **Site** the credit note was created in.
 - The example has **Durban** selected.
3. Set the **Status** to **New**.

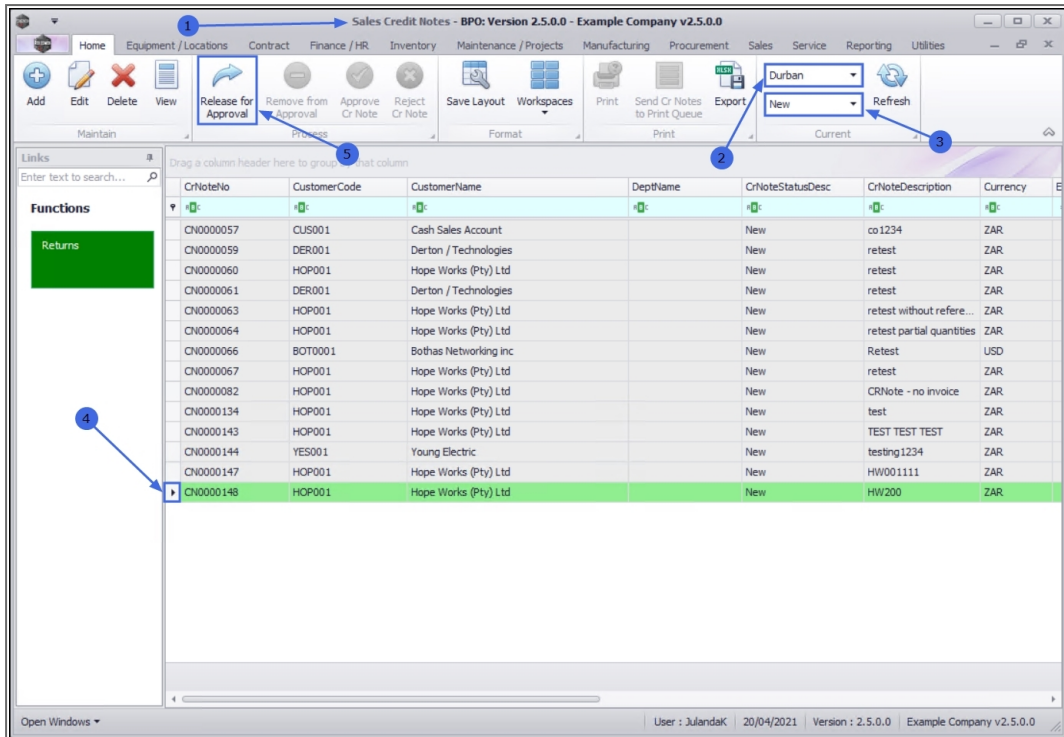


A Credit Note can only be released in the **New** status.

4. Click on the **row** of the Credit Note you wish to release for approval.
5. Click on **Release for Approval**.



Short cut key: **Right click** to display the **All groups** menu list. Click on **Release**.



6. When you receive the **Sales Credit Note - Release** message to inform you that;
 - **The credit note number CN[credit note number] has been released for authorisation successfully.**
7. Click on **OK**.

The screenshot shows the 'Sales Credit Notes' application window. The title bar indicates 'Sales Credit Notes - BPO: Version 2.5.0.0 - Example Company v2.5.0.0'. The interface includes a menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, and Reports. 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, and Export. A search bar and a Refresh button are also present.

The main area displays a table of credit notes with the following columns: CrNoteNo, CustomerCode, CustomerName, DeptName, CrNoteStatusDesc, and CrNoteDescription. The table contains several rows, with the last row (CN0000148) highlighted in green. A dialog box titled 'Sales Credit Note - Release' is open over the table, displaying a message: 'The credit note number CN0000148, has been released for authorisation successfully.' The dialog box has an 'OK' button and a close button (X). A blue arrow labeled '6' points from the 'Release for Approval' button in the toolbar to the dialog box, and another blue arrow labeled '7' points from the 'OK' button in the dialog box to the 'OK' button in the dialog box.

| CrNoteNo | CustomerCode | CustomerName | DeptName | CrNoteStatusDesc | CrNoteDescription |
|-----------|--------------|-----------------------|----------|------------------|---------------------------|
| CN0000057 | CUS001 | Cash Sales Account | | New | co1234 |
| CN0000059 | DER001 | Derton / Technologies | | New | retest |
| CN0000060 | HOP001 | Hope Works (Pty) Ltd | | New | retest |
| CN0000061 | DER001 | Derton / Technologies | | New | retest |
| CN0000063 | HOP001 | Hope Works (Pty) Ltd | | New | retest without refere... |
| CN0000064 | | | | New | retest partial quantities |
| CN0000066 | | | | New | Retest |
| CN0000067 | | | | New | retest |
| CN0000082 | | | | New | CRNote - no invoice |
| CN0000134 | | | | New | test |
| CN0000143 | | | | New | TEST TEST TEST |
| CN0000144 | | | | New | testing 1234 |
| CN0000147 | HOP001 | Hope works (pty) Ltd | | New | HW001111 |
| CN0000148 | HOP001 | Hope Works (Pty) Ltd | | New | HW200 |

You can now view the sales credit note in the *Sales Credit Notes* listing screen where the status is set to **Released**.

MNU.064.008

