



# **CONTRACTS**

# RELEASE / REMOVE / APPROVE / REJECT PROCESSES

After a credit note has been created, it has to go through an approval process which includes:

- Releasing the Credit Note for Approval or Removing the Credit Note from Approval
- Approving or Rejecting the Credit Note
- Printing the Credit Note (this step will post the transaction to Pastel)

**Ribbon Access:** Contract > Contract Credit Notes

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1. The *Contract Credit Notes* screen will be displayed.

# **RELEASE CONTRACT CREDIT NOTE FOR APPROVAL**

- Click on the drop-down *arrow* in the *Site* field and select from the list, the Site in which you wish to work.
  - In this example, *Durban* is selected.





This screen will open by default with the *Status* set to *New*. This does <u>not</u> need to be changed, in order to release a Contract Credit Note.



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## **SELECT CREDIT NOTE**

1. Select the *row* of the *contract credit note* that you wish to *release* for *approval*.

# **RELEASE CREDIT NOTE**

2. Click on *Release for Approval*.



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- 1. A *Sales Credit Note Release* message box will pop up informing you that;
  - The Credit Note number [] has been released for authorisation successfully.
- 2. Click on *Ok*.



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 The selected contract credit note will be *removed* from the *Contract Credit Notes* listing screen where the status is set to *New*.

## VIEW CREDIT NOTE IN THE RELEASED STATUS

2. Select the *Released* status.



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• The selected contract credit note has been *moved* to the *Contract Credit Notes* listing screen where the status is set to *Released*.



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# REMOVE CONTRACT CREDIT NOTE FROM APPROVAL

You will need to follow this process is used in order to *delete* a contract credit note and subsequently raise a *new credit note*, if required, as you <u>can</u>not delete the credit note in the *Released* status.

#### Select the Site and Status

- 1. In the Contract Credit Notes listing screen, select the *Site*.
  - ° In this image *Durban* has been selected.
- 2. Select the *Status*.
  - ° This must be set to *Released*.

Help v2.5.0.14 - Pg 7 - Printed: 25/06/2024



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#### Select Credit Note

1. Select the *row* of the *contract credit note* that you wish to *remove* from *approval*.

## **REMOVE CREDIT NOTE**

2. Click on *Remove from Approval*.



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## **CREDIT NOTE PLACED 'ON HOLD'**

- 1. A *Sales Credit Note Hold* message box will pop up informing you that;
  - The credit note number [], has been placed on hold successfully.
- 2. Click on *Ok*.



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## VIEW REMOVED CREDIT NOTE IN NEW STATUS

- The selected contract credit note will be *removed* from the *Contract Credit Notes* listing screen where the status is set to *Released*.
- 2. Select the *New* status.



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- 1. The credit note has been *moved* back to the *Contract Credit Notes* listing screen where the status is set to *New*.
- 2. You can now *Delete* the contract credit note (and raise a new one if required).



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# **APPROVE CONTRACT CREDIT NOTE**

#### Select the Site and Status

- 1. In the Contract Credit Notes screen, select the *Site*.
  - ° In this image *Durban* has been selected.
- 2. Select the *Status*.
  - ° This should be set to *Released*.



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#### Select Credit Note

1. Select the *row* of the *contract credit note* that you wish to *approve*.

# **APPROVE CREDIT NOTE**

1. Click on *Approve Cr Note*.



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CR0000014         R         TIA001         Titan Group         Image: CR0000015         R         TIA001         Titan Group         ZAR         1.00         14.00         27 Oct 2015         3         IN0000204           CR0000017         R         TIA001         Titan Group         ZAR         1.00         14.00         27 Oct 2015         3         IN0000204           CR0000017         R         HOP001         Hope Works         Tech         Technical         ZAR         1.00         14.00         27 Oct 2015         3         IN0000204           SC0000003         R         DER001         Derton Technologies         1234         ZAR         1.00         14.00         24 Apr 2016         2         STI000001           SC00000019         R         HOP001         Hope Works         Tech         Technical         ZAR         1.00         14.00         24 Apr 2016         2         STI000001           SC00000024         R         HOP001         Hope Works         Tech         Technical         OHW1111         ZAR         1.00         14.00         25 Peb 2018         12         IN0004043           SC0000024         R         HOP001         Hope Works         Tech         Technical         OHW1111	R0000014       R       T1A001       Titan Group       ZAR       1.00       14.00       27 Oct 2015       3       IN0000204         R0000017       R       T1A001       Titan Group       ZAR       1.00       14.00       27 Oct 2015       3       IN0000204         R0000017       R       HOP001       Hope Works       Tech       Technical       ZAR       1.00       14.00       27 Oct 2015       3       IN0000204         R0000017       R       HOP001       Hope Works       Tech       Technical       ZAR       1.00       14.00       25 Apr 2016       2       T1000016         R0000019       R       HOP001       Hope Works       Tech       Technical       ZAR       1.00       14.00       25 Apr 2016       2       ST000014         R0000019       R       HOP001       Hope Works       Tech       Technical       OHW1111       ZAR       1.00       14.00       19 Jun 2017       3       IN000403         R0000024       R       HOP001       Hope Works       Tech       Technical       OHW11111       ZAR       1.00       14.00       22 Feb 2018       12       IN000462         V       Input validation       Imput validation       Yer	R0000014       R       T1A001       Titan Group       Image: Constraint of the constraint	CR0000013	R	SAM001	Samanthas Diner				ZAR	1.00	14.00	27 Oct 2015	3	IN0000205	
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CR0000017         R         HOP001         Hope Works         Tech         Technical         ZAR         1.00         14.00         05 Apr 2016         12         IN0000251           STC0000003         R         DER001         Derton Technologies         1234         ZAR         1.00         14.00         05 Apr 2016         2         ST1000001           CR0000019         R         HOP001         Hope Works         Tech         Technical         ZAR         1.00         14.00         19 Jun 2017         3         IN0000403           CR0000024         R         HOP001         Hope Works         Tech         Technical         OHW1111         ZAR         1.00         14.00         25 Apr 2016         2         ST1000010           CR0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         22 Feb 2018         12         IN0000462           CR0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         22 Feb 2018         12         IN0000462           C         Are you sure you want to Approve cr note no.         CR0000024.         Vers	R0000017         R         HOP001         Hope Works         Tech         Technical         ZAR         1.00         14.00         05 Apr 2016         12         IN000026           R00000019         R         DER001         Derton Technologies         1234         ZAR         1.00         14.00         24 Apr 2016         2         ST000001           R0000019         R         HOP001         Hope Works         Tech         Technical         ZAR         1.00         14.00         24 Apr 2016         2         ST000001           R0000024         R         HOP001         Hope Works         Tech         Technical         OHW1111         ZAR         1.00         14.00         19.Jun 2017         3         IN0000493           R0000024         R         HOP001         Hope Works         Tech         Technical         OHW1111         ZAR         1.00         14.00         22 Feb 2018         12         IN0000462           R0000024         R         HOP001         Hope Works         Technical         OHW11111         ZAR         1.00         14.00         25 Feb 2018         12         IN0000462           Linput validation	R0000017       R       HOP001       Hope Works       Tech       Technical       ZAR       1.00       14.00       05 Apr 2016       12       IN000024         TC0000003       R       DER001       Derton Technologies       1234       ZAR       1.00       14.00       19 Apr 2016       2       STI000004         IR0000024       R       HOP001       Hope Works       Tech       Technical       OHW1111       ZAR       1.00       14.00       19 Apr 2016       2       STI000004         IR0000024       R       HOP001       Hope Works       Tech       Technical       OHW11111       ZAR       1.00       14.00       19 Apr 2016       2       STI000004         IR0000024       R       HOP001       Hope Works       Tech       Technical       OHW11111       ZAR       1.00       14.00       19 Apr 2016       22       IN000044         IR0000024       R       HOP001       Hope Works       Tech       Technical       OHW11111       ZAR       1.00       14.00       14.00       12.00       10.00       10.00       14.00       14.00       12.00       10.00       10.00       11.00       10.00       12.00       10.00       12.00       10.00       12.00	CR0000015	R	TIA001	Titan Group				ZAR	1.00	14.00	27 Oct 2015	3	IN0000203	
STC000003         R         DER01         Detan Technologies         1234         ZAR         1.00         14.00         24 Apr 2016         2 ST1000001           CR0000019         R         HOP001         Hope Works         Tech         Technical         ZAR         1.00         14.00         24 Apr 2016         2 ST1000001           CR0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         22 Feb 2018         12         IN0000462           CR0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         22 Feb 2018         12         IN0000462           T         Input validation         Input validation         Imput validation	TC000003         R         DER001         Derton Technologies         L         1234         ZAR         1.00         14.00         24 Apr 2016         2         ST100001           R0000019         R         HOP001         Hope Works         Tech         Technical         ZAR         1.00         14.00         24 Apr 2016         2         ST1000010           R0000024         R         HOP001         Hope Works         Tech         Technical         OHW1111         ZAR         1.00         14.00         29 Apr 2016         2         ST10000013           R0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         22 Feb 2018         12         IN0000462           Imput validation          Are you sure you want to Approve or note no. CR0000024,	TC0000003         R         DER001         Derton Technologies         1234         ZAR         1.00         14.00         24 Apr 2016         2 ST1000004           CR0000019         R         HOP001         Hope Works         Tech         Technical         ZAR         1.00         14.00         19 Jun 2017         3 IN000044           CR0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         24 Apr 2016         2 ST100004           CR0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         24 Apr 2016         2 ST100004           CR0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         24 Apr 2016         22 N000044	CR0000017	R	HOP001	Hope Works	Tech	Technical		ZAR	1.00	14.00	05 Apr 2016	12	IN0000261	
CR0000019         R         HOP001         Hope Works         Tech         Technical         ZAR         1.00         14.00         19 Jun 2017         3         IN0000403           CR0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         122         Feb 2018         12         IN0000462	R0000019         R         HOP001         Hope Works         Tech         Technical         ZAR         1.00         14.00         19 Jun 2017         3         IN0000403           R0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         19 Jun 2017         3         IN0000403           R0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         22 Feb 2018         12         IN0000463           Imput validation	Internation	STC0000003	3 R	DER001	Derton Technologies			1234	ZAR	1.00	14.00	24 Apr 2016	2	STI000001	
CR0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         22 Feb 2018         12         IN0000462           Imput validation	R0000024         R         HOP001         Hope Works         Tech         Technical         OHW11111         ZAR         1.00         14.00         22 Feb 2018         12         IN0000462           Imput validation	2R0000024 R HOP001 Hope Works Tech Technical OHW11111 ZAR 1.00 14.00 22 Feb 2018 12 IN000044	CR0000019	R	HOP001	Hope Works	Tech	Technical		ZAR	1.00	14.00	19 Jun 2017	3	IN0000403	
1 Input validation X Are you sure you want to Approve cr note no. CR0000024. 2 Ves No	Input validation     ×       ? Are you sure you want to Approve cr note no. CR0000024.       2     Yes	1 Input validation Are you sure you want to Approve cr note no. CR0000024. 2 Yes No	CR0000024	R	HOP001	Hope Works	Tech	Technical	OHW11111	ZAR	1.00	14.00	22 Feb 2018	12	IN0000462	
2 Yes No	2 Ves No	2 Yes No						? Are you su	ire you want to	o Approve cr note	e no. CR0000024.					
									2	Yes	No					

1. A *Credit Note Authorisation* message box will pop up informing you that;

° Authorisation for Credit Note No. [ ], has been successful.

2. Click on *Ok*.



dd View Maintain g a column hea CrNoteNo C	Equipment and Delete ader here to gr CrNoteStatus	Locations Con proval Remo App Proval P Proup by that colum CustomerCode	ve from Approve 1 vroval Cr Note C	IR Invento	ory Maintena	Vorkspaces	Manufacturin int Send Cr I to Print C Print	g Procurement Durbar Notes Queue	Sales ed Current	Service Repo	rting Utilities	- 8	3
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dd View Maintain g a column hea CrNoteNo C CR0000002 F	Delete Rei A ader here to gro CrNoteStatus	ease for Remo pproval App F oup by that colum CustomerCode	ve from Approve roval Cr Note ( Process	Reject S Cr Note	ave Layout V	Vorkspaces Pr	int Send Cr I to Print C Print	Notes Queue	ed •	Refresh			
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g a column hea CrNoteNo C CR0000002 F	ader here to gr CrNoteStatus	oup by that colum	CustomerName	-		-		-					
CrNoteNo CR0000002 F	CrNoteStatus	CustomerCode	CustomerName										
CR000002 F				DeptCode	DeptName	CustomerOrder	No Currency	ExchangeRate	TaxRate	CrNoteDate	BillingPeriod	InvoiceNo	
CR000002 F													
	R	HOP001	Hope Works	Tech	Technical		ZAR	1.00	14.00	31 May 2014	3	IN000005	
CR0000007 F	R	SAM001	Samanthas Diner				ZAR	1.00	14.00	23 Sep 2014	6	IN000078	
CR0000013 F	R	SAM001	Samanthas Diner				ZAR	1.00	14.00	27 Oct 2015	3	IN0000205	
CR0000014 F	R	TIA001	Titan Group				ZAR	1.00	14.00	27 Oct 2015	3	IN0000204	
CR0000015 F	R	TIA001	Titan Group				ZAR	1.00	14.00	27 Oct 2015	3	IN0000203	
CR0000017 F	R	HOP001	Hope Works	Tech	Technical		ZAR	1.00	14.00	05 Apr 2016	12	IN0000261	
STC000003 F	R	DER001	Derton Technologies			1234	ZAR	1.00	14.00	24 Apr 2016	2	STI0000013	
CR0000019 F	R	HOP001	Hope Works	Tech	Technical		ZAR	1.00	14.00	19 Jun 2017	3	IN0000403	
CR0000024 F	R	HOP001	Hope Works	Tech	Technical	OHW11111	ZAR	1.00	14.00	22 Feb 2018	12	IN0000462	
				i Au	uthorisation fo uccessful.	or Credit Note No	., CR0000024, I	has been					
			L			2		ОК					

#### VIEW CREDIT NOTE IN THE APPROVED STATUS

- The selected credit note will be *removed* from the *Contract Credit Notes* listing screen where the status is set to *Released*.
- 2. Select the *Approved* status.



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н	ome Equipment	t and Locations C	Contract Finance and H	IR Inve	ntory Maintenar	nce and Proj	ects Ma	anufacturing	p Proc	urement	Sales	Service Re	porting	Utilities	_ 8	×
Ð	👌 🗙	P	9	×	23			2		Durban		•				
Add	View Delete	Release for Rer	move from Approve	Reject	Save Layout W	orkspaces	Print	Send Cr 1	lotes	Release	- ·	Refresh				
Mai	otain	Approval A	Process	Crivote	Format			Drint Q	ueue	Status	ň	StatusDesc				
Mai			FIDCESS	4	i uniac			FILL	A	N <sup>×</sup>	Ne	W				
Drag a colu										A	Ap	proved				
CrNoteN	No CrNoteSta	tus CustomerCod	e CustomerName	DeptCod	le DeptName	Customer	OrderNo	Currency	Exchan	D	De	clined		iod	InvoiceNo	Au
9										C	Ca	ntea incelled				
I CR0000	002 R	HOP001	Hope Works	Tech	Technical			ZAR						3	IN000000	5 Ye
CR0000	007 R	SAM001	Samanthas Diner					ZAR		×				// 6	IN000007	3 Yes
CR0000	013 R	SAM001	Samanthas Diner					ZAR		1.00	14.00	27 Oct 201	5	3	IN000020	5 No
CR0000	014 R	TIA001	Titan Group					ZAR		1.00	14.00	27 Oct 201	5	3	IN000020-	4 No
CR0000	015 R	TIA001	Titan Group					ZAR		1.00	14.00	27 Oct 201	5	3	IN0000203	3 No
CR0000	017 R	HOP001	Hope Works	Tech	Technical			ZAR		1.00	14.00	05 Apr 2016	5	12	IN000026	1 No
STC000	0003 R	DER001	Derton Technologies			1234		ZAR		1.00	14.00	24 Apr 2016	6	2	STI00000	13 No
CR0000	019 R	HOP001	Hope Works	Tech	Technical			ZAR		1.00	14.00	19 Jun 201	7	3	IN000040	3 Yes
1																
4																
Open Wind	iows 🔻													21 Feb	2018	

 The selected credit note has been *moved* to the *Contract Credit Notes* listing screen where the status is set to *Approved*.





# **REJECT CONTRACT CREDIT NOTE**

#### Select the Site and Status

- 1. In the Contract Credit Notes screen, select the *Site*.
  - In this image *Durban* has been selected.
- 2. Select the Status.
  - This should be set to *Released*.



			Co	ntract Cr	redit Notes - BPO	: Version 2.1.	.0.47 - E	kample Co	mpany			·		$\times$
Home	Equipment an	d Locations Cor	ntract Finance and H	R Inve	ntory Maintenar	nce and Proje	cts Ma	nufacturing	g Procurement	Sales	Service Repo	orting Utilities	- 8	×
<b>A</b>	X			×	2		3		Durban	1.	- 62			
Add View	Delete Re	elease for Remo	ve from Approve	Reject	Save Layout W	/orkspaces	Print	Send Cr N	Notes Delease	ed .	Refresh			
	A	Approval App	oroval Cr Note C	r Note		Ŧ		to Print Q	lueue	eu		2		
Maintain		F	Process		Format			Print		Current	A	-		
CrNoteNo	CrNoteStatus	CustomerCode	CustomerName	DeptCod	le DeptName	CustomerOr	rderNo	Currency	ExchangeRate	TaxRate	CrNoteDate	BillingPeriod	InvoiceNo	A
7														
CR000002	R	HOP001	Hope Works	Tech	Technical			ZAR	1.00	14.00	31 May 2014	3	IN000005	Y
CR000007	R	SAM001	Samanthas Diner					ZAR	1.00	14.00	23 Sep 2014	6	IN000078	Y
CR0000013	R	SAM001	Samanthas Diner					ZAR	1.00	14.00	27 Oct 2015	3	IN0000205	N
CR0000014	R	TIA001	Titan Group					ZAR	1.00	14.00	27 Oct 2015	3	IN0000204	F N
CR0000015	R	TIA001	Titan Group					ZAR	1.00	14.00	27 Oct 2015	3	IN0000203	N
CR0000017	R	HOP001	Hope Works	Tech	Technical			ZAR.	1.00	14.00	05 Apr 2016	12	IN0000261	N
STC000003	R	DER001	Derton Technologies			1234		ZAR.	1.00	14.00	24 Apr 2016	2	STI000001	3 N
CR0000019	R	HOP001	Hope Works	Tech	Technical			ZAR	1.00	14.00	19 Jun 2017	3	IN0000403	Y
	•											21 Feb	2018	1

#### Select Credit Note

1. Select the *row* of the *contract credit note* that you wish to *reject*.

# **REJECT CREDIT NOTE**

2. Click on *Reject Cr Note*.



				Co	ontract C	redit Notes - BPO	: Version 2.	1.0.47 - E	xample Co	mpany				_		$\times$
Home	Equipment a	nd Locations	Contract	Finance and H	IR Inve	entory Maintenar	nce and Proj	ects M	anufacturing	Proc	urement	Sales	Service Rep	orting Utilities	- 8	х
	×	à		$\bigcirc$		50					Durban		42			
Add View	Delete F	Release for R	emove from	Approve	Reject	Save Layout W	orkspaces	Print	Send Cr N	Notes	Delega		Refresh			
		Approval	Approval	Cr Note	Cr Note		2		to Print Q	ueue	Release					
Maintain	4		Process			Format	<b>2</b> ,		Print			Current	4			
Drag a column h	here to															
CrNoteNo	CrNoteStatus	s CustomerCo	de Custom	erName	DeptCo	de DeptName	Customer	OrderNo	Currency	Exchan	geRate	TaxRate	CrNoteDate	BillingPeriod	InvoiceNo	Aut
9																
CR0000002	R	HOP001	Hope W	/orks	Tech	Technical			ZAR		1.00	14.00	31 May 2014	3	IN0000005	i Yes
CR0000007	R	SAM001	Samant	has Diner					ZAR		1.00	14.00	23 Sep 2014	6	IN0000078	8 Yes
CR0000013	R	SAM001	Samant	has Diner					ZAR		1.00	14.00	27 Oct 2015	3	IN0000205	5 No
CR0000014	R	TIA001	Titan Gr	roup					ZAR		1.00	14.00	27 Oct 2015	3	IN0000204	ł No
CR0000015	R	TIA001	Titan Gr	roup					ZAR		1.00	14.00	27 Oct 2015	3	IN0000203	8 No
CR0000017	R	HOP001	Hope W	/orks	Tech	Technical			ZAR		1.00	14.00	05 Apr 2016	12	IN0000261	l No
STC000003	R	DER001	Derton	Technologies			1234		ZAR		1.00	14.00	24 Apr 2016	2	STI000001	3 No
CR0000019	R	HOP001	Hope W	/orks	Tech	Technical			ZAR		1.00	14.00	19 Jun 2017	3	IN0000403	8 Yes
4 C	_													Di E I	-	+

• An Input Validation message box will pop up asking;

° Are you sure you want to Reject cr note no. [ ]?

• Click on Yes.



Home Home View Maintain	Equipment and Delete Re	Locations Cor	tract Finance and H		uit Notes - DPO	: Version 2.1.0.47 -	Example Co	mpany			-	
dd View	Delete Re			R Invent	tory Maintenar	nce and Projects	Manufacturin	g Procurement	Sales :	Service Repo	rting Utilities	- 8
dd View Maintain	Delete Re	Pr V	) 🕑	8	2		1 📃	Durban				
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Picili Techi T		pprovai <b>App</b>	Process	TNOLE	Format		Drint	lueue	Ourrent			
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CrNoteNo	CrNoteStatus	CustomerCode	CustomerName	DeptCode	DeptName	CustomerOrderNo	Currency	ExchangeRate	TaxRate	CrNoteDate	BillingPeriod	InvoiceNo
CR0000002	R	HOP001	Hope Works	Tech	Technical		ZAR	1.00	14.00	31 May 2014	3	IN000005
CR0000007	R	SAM001	Samanthas Diner				ZAR	1.00	14.00	23 Sep 2014	6	IN000078
CR0000013	R	SAM001	Samanthas Diner				ZAR	1.00	14.00	27 Oct 2015	3	IN0000205
R0000014	R	TIA001	Titan Group				ZAR	1.00	14.00	27 Oct 2015	3	IN0000204
CR0000015	R	TIA001	Titan Group				ZAR	1.00	14.00	27 Oct 2015	3	IN0000203
CR0000017	R	HOP001	Hope Works	Tech	Technical		ZAR	1.00	14.00	05 Apr 2016	12	IN0000261
STC0000003	R	DER001	Derton Technologies			1234	ZAR	1.00	14.00	24 Apr 2016	2	STI000001
CR0000019	R	HOP001	Hope Works	Tech	Technical		ZAR	1.00	14.00	19 Jun 2017	3	IN0000403
				? Are	e you sure you w	vant to Reject cr no	ote no. CR000	00002. No				

## **ADD REJECTION COMMENTS**

- 1. A second message box will pop up asking;
  - Please add the rejection comment against this credit note?
- 2. Click on OK.



	-				С	Contract Cr	redit Notes - BPC	): Version 2.	1.0.47 - E	xample Co	mpany					-		$\times$
0	Home	Equipment an	nd Locations C	Contract F	inance and	HR Inve	entory Maintena	ince and Proj	jects Ma	anufacturing	g Proc	urement	Sales	Service	Repor	rting Utilities	- 8	x
4	2	X	R		$\checkmark$	×	21					Durban		- 42	4			
Add	View	Delete R	Release for Re	move from	Approve	Reject	Save Layout V	Vorkspaces	Print	Send Cr N	Notes	Releas	ed ,	Refree	sh			
			Approval /	Approval	Cr Note	Cr Note		÷		to Print Q	lueue	100.000						
_	Maintain	4	_	Process	_		Format	4		Print			Current					
CrNe	oteNo	CrNoteStatus	CustomerCod	de Custome	arName	DeptCod	de DeptName	Customer	OrderNo	Currency	Exchan	geRate	TaxRate	CrNoteDa	ate	BillingPeriod	InvoiceNo	AL
7																		
CRO	000002	R	HOP001	Hope Wr	orks	Tech	Technical			ZAR		1.00	14.00	31 May 2	2014	3	IN000000	5 Ye
CR0	000007	R	SAM001	Samanth	has Diner					ZAR		1.00	14.00	23 Sep 20	014	6	IN000007	3 Ye
CRO	000013	R	SAM001	Samanth	has Diner					ZAR		1.00	14.00	27 Oct 20	015	3	IN000020	5 No
CR0	000014	R	TIA001	Titan Gre	oup					ZAR		1.00	14.00	27 Oct 20	015	3	IN000020	4 No
CRO	000015	R	TIA001	Titan Gr	oup					ZAR		1.00	14.00	27 Oct 20	015	3	IN000020	3 No
CRO	000017	R	HOP001	Hope W	orks	Tech	Technical			ZAR		1.00	14.00	05 Apr 20	016	12	IN000026	1 No
STC	0000003	R	DER001	Derton T	rechnologies	s		1234		ZAR		1.00	14.00	24 Apr 20	016	2	STI00000	13 No
CRO	000019	R	HOP001	Hope Wr	orks	Tech	Technical			ZAR		1.00	14.00	19 Jun 20	017	3	IN000040	3 Ye
				•				2	•	P OK	1	]						

- 1. The *Rejection Comment* screen will pop up.
- 2. Type a *comment* relating to the reason for this contract credit note rejection, in the text box.
- 3. Click on *Save*.



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1. A *Credit Note Authorisation* message box will pop up informing you that;

• The Credit Note no., [] has been declined successfully.

2. Click on *Ok*.



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## **VIEW CREDIT NOTE IN DECLINED STATUS**

- The selected credit note will be *removed* from the *Contract Credit Notes* listing screen where the status is set to *Released*.
- 2. Select the *Declined* status.



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 The selected credit note has been *moved* to the *Contract Credit Notes* listing screen where the status is set to *Declined*.





## **PRINT CREDIT NOTE**

#### Select the Site and Status

- 1. In the Contract Credit Notes listing screen, select the *Site*.
  - In this image *Durban* has been selected.
- 2. Select the Status.
  - This must be set to *Approved*.





#### Select Credit Note

1. Select the *row* of the *contract credit note* that you wish to *print*.

## **PRINT CREDIT NOTE**

2. Click on *Print*.





#### **SELECT PRINT OPTION**

- 1. A *Select the option as desired* screen will pop up.
- 2. Select the required radio button print option from the list. In this example, *Print Credit Note* is selected.
- 3. Click on *Accept*.



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## Suppress Discount Column

- 1. A *Report Generation* message box will pop up asking;
  - Do you want to suppress the discount column on the report?
- 2. Click on **Yes** if you wish to *hide* the discount column on the report.
- 3. Click on **No** if you wish to *show* the discount column on the report.





## VIEW CREDIT NOTE PRINT PREVIEW

- The *Report Preview* screen will be displayed.
- From here you can *View*, *Print*, *Export* or *Email* the contract credit note.
- *Close* the Report Preview screen when done.





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