

We are currently updating our site; thank you for your patience.

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**.

 $\overset{\checkmark}{\frown}$ 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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 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.



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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

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