

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

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.

 $\overset{\checkmark}{\frown}$ A Credit Note can only be released in the New status.

- 4. Click on the **row** of the Credit Note you with 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.



	e Equipmen	t / Locations Cont	ract Finance / HR	Inventory Maintenance / Projects Manufact	turing Procurement	Sales Service F	Reporting Utilities	_ 8	
Add Edit	Delete Vie			Reject Save Layout Workspaces Print		Durban	• Refresh		
Maint	tain	Approva	Process	Format	Print	Current			
inks	a.	-	5		-	a corren	3		
nter text to sear					2	·			
		CrNoteNo	CustomerCode	CustomerName	DeptName	CrNoteStatusDesc	CrNoteDescription	Currency	
Functions		9 8 ⊡ C	8 8 C	R C	a 🗖 c	8 0 0	8 C	a 🛛 c	
		CN0000057	CUS001	Cash Sales Account		New	co1234	ZAR	
Returns		CN0000059	DER001	Derton / Technologies		New	retest	ZAR	
		CN000060	HOP001	Hope Works (Pty) Ltd		New	retest	ZAR	
		CN0000061	DER001	Derton / Technologies		New	retest	ZAR	
		CN0000063	HOP001	Hope Works (Pty) Ltd		New	retest without refere	ZAR	
		CN0000064	HOP001	Hope Works (Pty) Ltd		New	retest partial quantities	ZAR	
		CN0000066	BOT0001	Bothas Networking inc		New	Retest	USD	
		CN0000067	HOP001	Hope Works (Pty) Ltd		New	retest	ZAR	
		CN000082	HOP001	Hope Works (Pty) Ltd		New	CRNote - no invoice	ZAR	
4		CN0000134	HOP001	Hope Works (Pty) Ltd		New	test	ZAR	
		CN0000143	HOP001	Hope Works (Pty) Ltd		New	TEST TEST TEST	ZAR	
		CN0000144	YES001	Young Electric		New	testing 1234	ZAR	
		CN0000147	HOP001	Hope Works (Pty) Ltd		New	HW001111	ZAR	
		CN0000148	HOP001	Hope Works (Pty) Ltd		New	HW200	ZAR	

- 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.



Home Equi	ipment ,	/Locations Contr	ract Finance / HR I	Inventory Maintenance / Projects Manu	facturing Procurement	Sales Service R	epor 🕑 i 🗕 🗗 🔅
🗗 🍃 🗙			00			Durban	•
Add Edit Delete	View	Approval	Remove from Approve Approval Cr Note	Reject Save Layout Workspaces P Cr Note	rint Send Cr Notes Expo to Print Queue	rt New	 Refresh
Maintain		Approva	Process	Format	Print	Curren	
inks	4	-1				-	1/1/1
nter text to search	· م		r here to group by that col				
		CrNoteNo	CustomerCode	CustomerName	DeptName	CrNoteStatusDesc	CrNoteDescription
Functions	9	* # D c	A D 4	×0:	REC	n 🗖 c	R C
Returns		CN0000057	CUS001	Cash Sales Account		New	co1234
Returns		CN0000059	DER001	Derton / Technologies		New	retest
		CN0000060	HOP001	Hope Works (Pty) Ltd		New	retest
		CN0000061	DER001	Derton / Technologies		New	retest
	_	CN000063	Sales Credit Note -	Hope Works (Ptv) Ltd		New	retest without refere.
	_	CN0000064	Sales Credit Note -	Release	-6 ×	New	retest partial quantitie
		CN0000066	_	4		New	Retest
		CN0000067	The cred successf	dit note number CN0000148, has been relea	sed for authorisation	New	retest
		CN0000082	successf	runy.		New	CRNote - no invoice
		CN0000134	_			New	test
	_	CN0000143	-	7	ОК	New	TEST TEST TEST
		CN0000144	_		OR	New	testing1234
		CN0000147	HOPOUI	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