

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

SALES

CREDIT NOTES - APPROVE 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 **Released**.
- 4. Click on the **row** of the credit note you wish to approve.
- 5. Click on **Approve Cr Note**.

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



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- 6. When you receive the **Input Validation** message to confirm;
 - Are you sure you want to Approve cr note no. CN[credit note number]?
- 7. Click on **Yes** to proceed with the approval process, or
 - Click on No to ignore the request and to return to the Sales
 Credit Notes listing screen.



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- 8. If you have selected **Yes** on the **Input Validation** screen, then you will receive the **Credit Note Authorisation** message to confirm that;
 - Authorisation for Credit Note No. CN[credit note number] has been successful.
- 9. Click on OK.



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The authorised credit note can now be viewed in the **Sales Credit Note** listing screen where the **Status** is set to **Approved**.

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