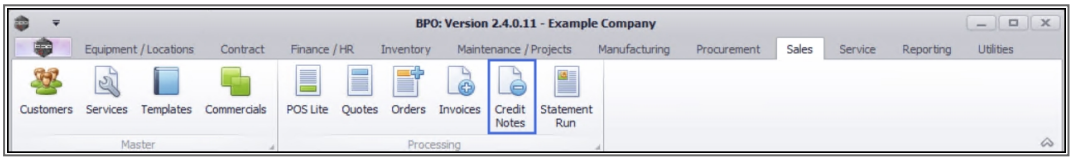
We are currently updating our site; thank you for your patience.

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**.

> 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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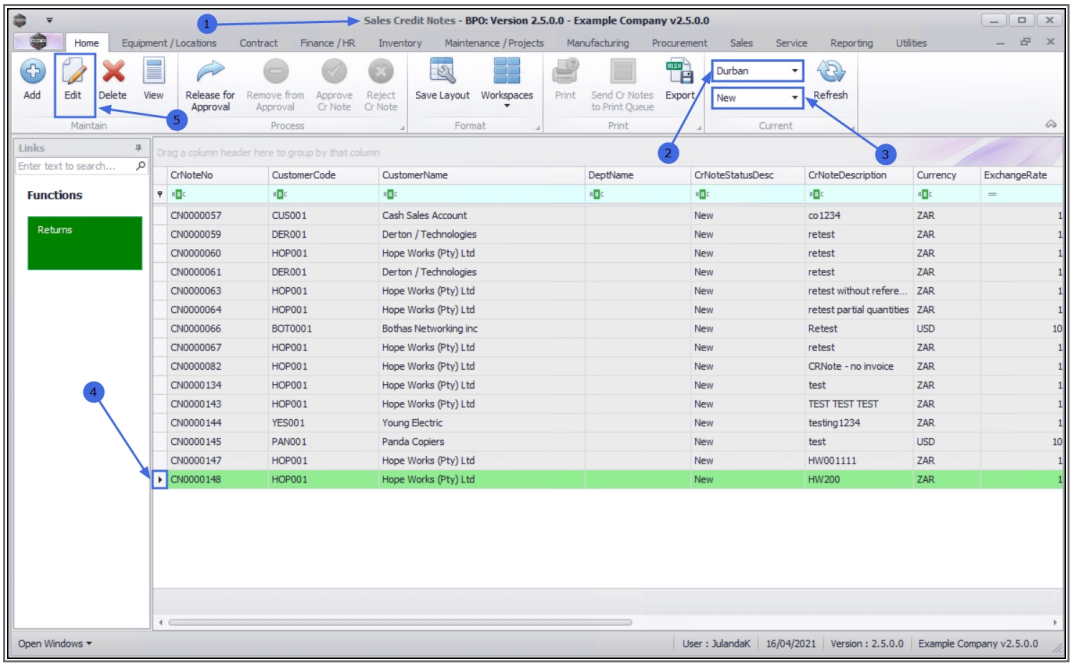

6. The **Edit Customer Credit Note - CN[**credit note number**]** screen will be displayed.

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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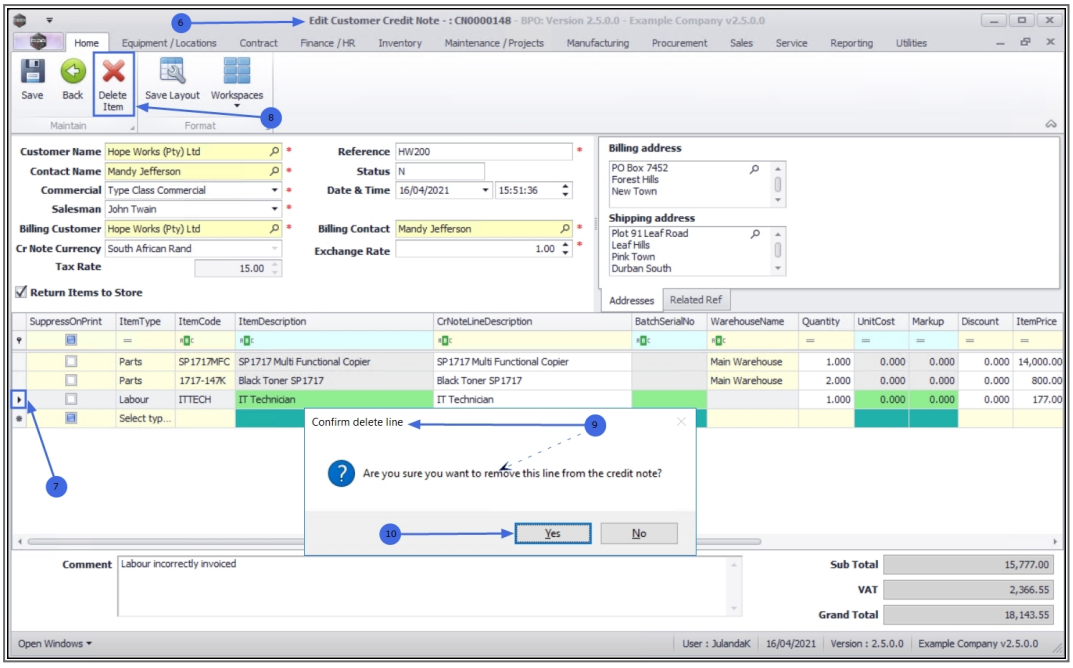
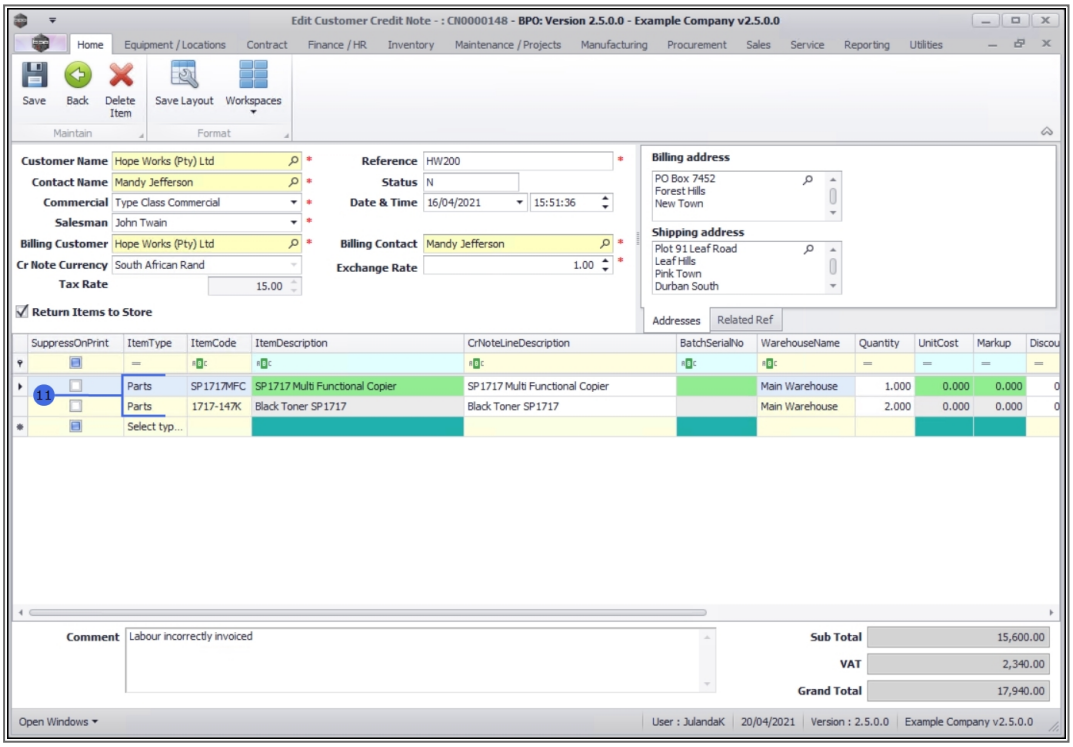


11. The item has been removed from the credit note items data grid.



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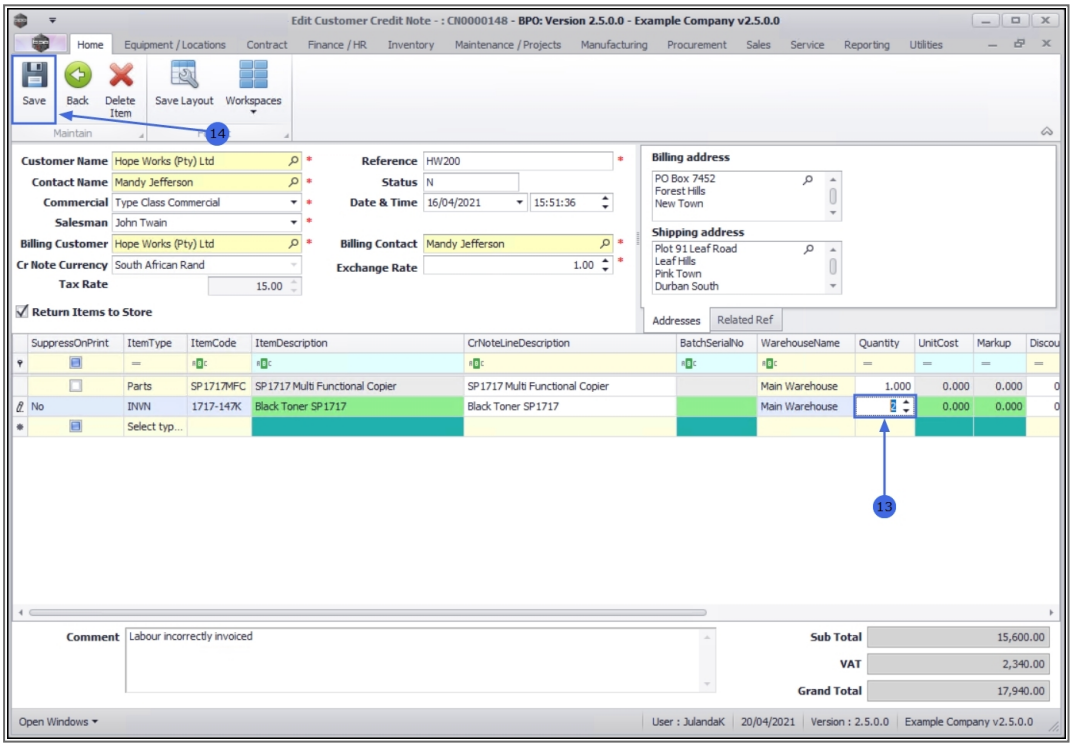
CREDIT A QUANTITY

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**.



You will return to the **Sales Credit Notes** listing screen.

Related Topics

- Create a Linked Credit Note
- Cancel or View a Credit Note

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- Credit Note Process
- Credit Note Print Process

MNU.064.005

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