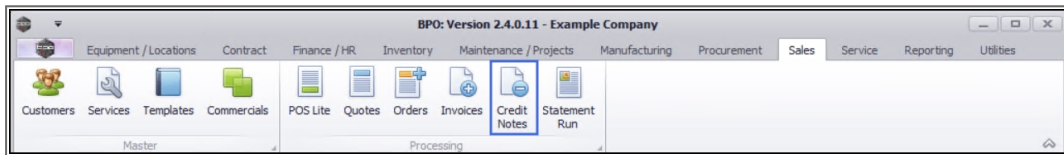


We are currently updating our site; thank you for your patience.

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**.

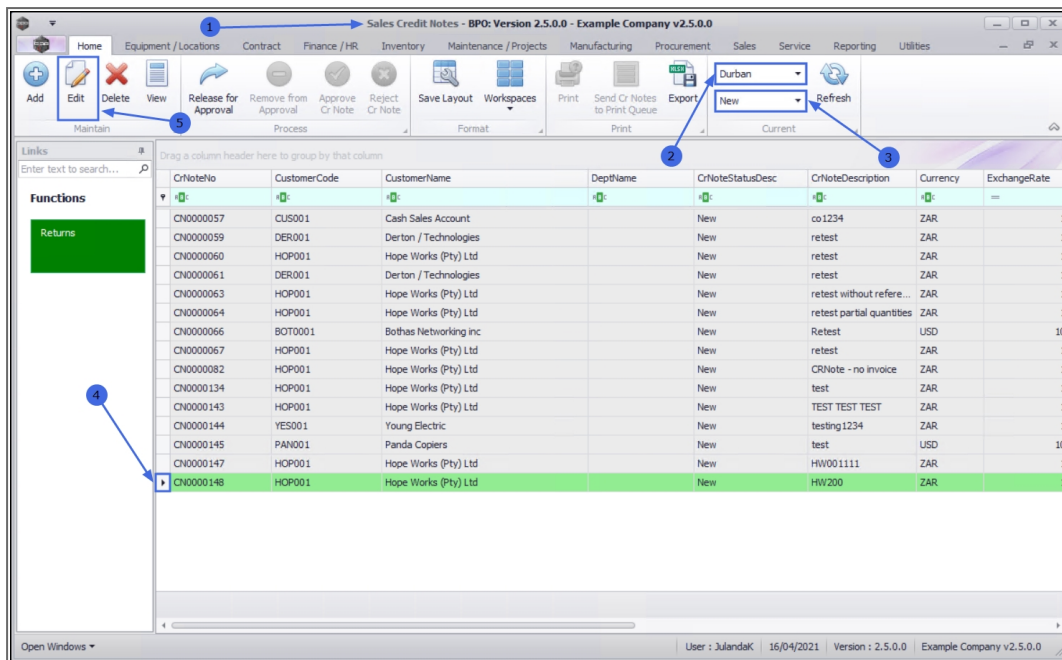


A Credit Note can only be edited in the **New** status.

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**.



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.

Customer Name: Hope Works (Pty) Ltd
Contact Name: Mandy Jefferson
Commercial: Type Class Commercial
Salesman: John Twain
Billing Customer: Hope Works (Pty) Ltd
Cr Note Currency: South African Rand
Tax Rate: 15.00

Reference: HW200
Status: N
Date & Time: 16/04/2021 15:51:36
Billing Contact: Mandy Jefferson
Exchange Rate: 1.00

Billing address: PO Box 7452, Forest Hills, New Town
Shipping address: Plot 91 Leaf Road, Leaf Hills, Pink Town, Durban South

SuppressOnPrint	ItemType	ItemCode	ItemDescription	CrNoteLineDescription	Batch/SerialNo	WarehouseName	Quantity	UnitCost	Markup	Discount	ItemPrice
	Parts	SP1717MFC	SP1717 Multi Functional Copier	SP1717 Multi Functional Copier		Main Warehouse	1.000	0.000	0.000	0.000	14,000.00
	Parts	1717-147K	Black Toner SP1717	Black Toner SP1717		Main Warehouse	2.000	0.000	0.000	0.000	800.00
	Labour	ITTECH	IT Technician	IT Technician			1.000	0.000	0.000	0.000	177.00

Sub Total: 15,777.00
VAT: 2,366.55
Grand Total: 18,143.55

Comment: Labour incorrectly invoiced

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

Customer Name: Hope Works (Pty) Ltd
Contact Name: Mandy Jefferson
Commercial: Type Class Commercial
Salesman: John Twain
Billing Customer: Hope Works (Pty) Ltd
Cr Note Currency: South African Rand
Tax Rate: 15.00

Reference: HW200
Status: N
Date & Time: 16/04/2021 15:51:36
Billing Contact: Mandy Jefferson
Exchange Rate: 1.00

Billing address: PO Box 7452, Forest Hills, New Town
Shipping address: Plot 91 Leaf Road, Leaf Hills, Pink Town, Durban South

SuppressOnPrint	ItemType	ItemCode	ItemDescription	CrNoteLineDescription	Batch/SerialNo	WarehouseName	Quantity	UnitCost	Markup	Discount	ItemPrice
	Parts	SP1717MFC	SP1717 Multi Functional Copier	SP1717 Multi Functional Copier		Main Warehouse	1.000	0.000	0.000	0.000	0.00
	Parts	1717-147K	Black Toner SP1717	Black Toner SP1717		Main Warehouse	2.000	0.000	0.000	0.000	0.00

Sub Total: 15,600.00
VAT: 2,340.00
Grand Total: 17,940.00

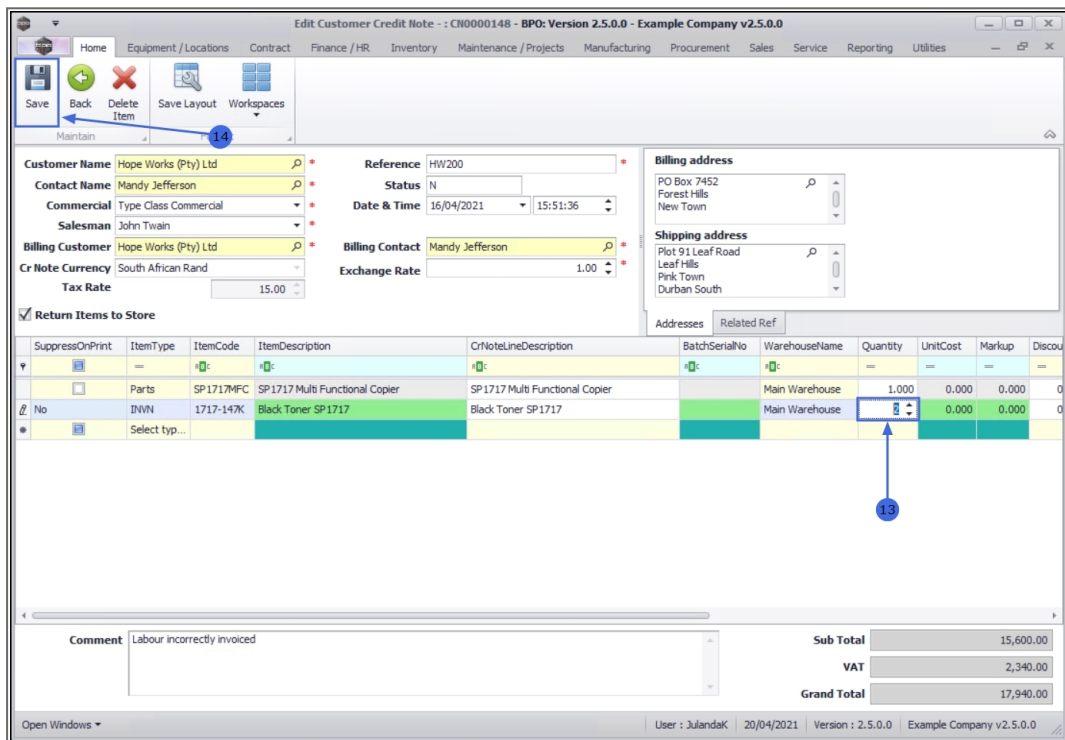
Comment: Labour incorrectly invoiced

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](#)



- [Credit Note Process](#)
- [Credit Note Print Process](#)

MNU.064.005

