

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

SERVICE

CALLS - ADD A CREDIT NOTE

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the Call Centre Mode notes.

When Call Credit Notes are raised, remember the following:

- Partial credit notes can be raised.
- Select whether or not to return the stock to store.
- If you select to return to store, you **must** complete a **return request** in order to move your stock back to the warehouse.
- When credit notes are raised in order to adjust incorrect pricing on an invoice, there is no need to return the stock to store.

Ribbon Select Service > Calls



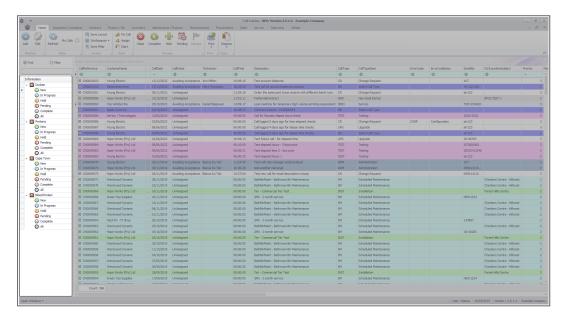
• The **Call Listing** screen will be displayed.

¹BPO2 v2.5.1.3 or higher



Image: Constraint of the second sec	alReference	Work Work	Proce	CalState +D: Amailing Acceptance Amoting Acceptance UnAssigned		CalTime *D: 10:09:10 16:18:30	Description G: Test account balances	CalType +D:	CallTypeDesc IQ:	ErrorCode 10:	ErrorCodeDesc	SeriaNo 10:	CtriLocationSubject	Priority
Image: Constraint of the second sec	alReference CN0001003 CN0001002 CN0001002 CN0001002 CN0000996 CN0000999 CN0000999 CN0000999	CustomerName	13/12/2022 12/12/2022 29/11/2022 31/10/2022	Awaiting Acceptance Awaiting Acceptance UnAssigned	1 0: Arin Milton	(D) 10:09:10	·0:	·0:						Priority
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New New In Progress Hold Complete Al New New	CN0001001 CN0000996 CN0000992 CN0000991 CN0000991	Young Electric Hope Works (Pty) Ltd Top Vehicle Hire Apple Juice Inc	29/11/2022 31/10/2022	UnAssigned	risely manipoon		Test call for account balances manual.	DR	Select Cal Type			19-12/1202		1
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Conplete	CN0000991 CN0000989	Apple Juice Inc											BP02 (C5) 1	
Al Al Pretoia New In Progress Hold	CN0000989		0444070077		variel balgowen	14:09:17	Loan machine for temporary high volume printing requirement Contract Closure - CO0000054	SERV	Service			TOP 12340LD		
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New New In Progress Hold	CN0000988	Derton / Technologies	13/06/2022			09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
In Progress Hold		Young Electric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
O Hold	CN0000987	Young Electric	06/06/2022			05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin 123		
	CN0000986	Young Electric	07/06/2022			05:00:00		DR	Select Cal Type			sin123		
	CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-98765		
Pending Complete	CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
Q Al	CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Cape Town	CN0000982	Young Electric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin 123		
O New E	CN0000976	Young Electric	19/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		
	CN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
	CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
	CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinNaint - Bathroom Bin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hilcrest	
C Complete	CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	CN0000969	Hope Works (Pty) Ltd	16/11/2019			03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
	CN0000968	Green Tea Supples	16/11/2019			08:00:00	246 - 2 month service	514	Scheduled Maintenance			NEW 1234	Toresering conoc	
	CN0000967	Westwood Dynamic	15/11/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance			14217 2237	Checkers Centre - Hildrest	
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O Hold	CN0000966	Westwood Dynamic	08/11/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance BathBinMaint - Bathroom Bin Maintenance	94 94	Scheduled Maintenance				Checkers Centre - Hilcrest Checkers Centre - Hilcrest	
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O complete	CN0000964	Hack PC - IT Shop	26/10/2019			03:00:00	2MS - 2 month service	24.4				147807		
	CN0000963	Westwood Dynamic	25/10/2019			08:00:00	BathSinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	CN0000961	Hope Works (Pty) Ltd	18/10/2019			03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
	CN0000960	Westwood Dynamic	18/10/2019			08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
E	CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
E	CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		03:00:00	SathSinNaint - Bathroom Bin Maintenance	\$14	Scheduled Maintenance				Checkers Centre - Hilcrest	
E	CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
E	CN0000956	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
E	CN0000955	Hope Works (Pty) Ltd	18/09/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
E	CN0000954	Green Tea Supplies	17/09/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
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	Count: 386													

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.



• Select the **Call** you wish to work with.



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formation	E CN0001003	Young Bectric	13/12/2022	Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
New	E CN0001001	Young Electric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num	CR	Change Request			sin123		
In Progress In Hold	E CN0000995	Hope Works (Pty) Ltd		UnAssigned			ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
O Pending 1	→ E CN0000992	Top Vehicle Hire	25/10/2022	Awaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement	t SERV	Service			TOP 1234OLD		
O Complete	E (N0000991	Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - CO0000054	DR	Select Call Type					
O Al	E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria	E CN0000988	Young Bectric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
O New	E CN0000987	Young Bectric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
In Progress	CN0000986	Young Electric	07/06/2022	UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin 123		
(b) Hold	E CN0000985	Hope Works (Pty) Ltd				16:09:13	Test future call - for elapsed time	UPG	Upprade					
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Complete	E CN0000983	Hope Works (Pty) Ltd		UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
_ O AI	E CN0000982	Young Electric		UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
Cape Town	E CN0000975			Awaiting Acceptance	Banca Du Tolt	11:24:39	Test with site manager email entered	ADM	Administration			107		
 In Progress 	E CN0000974	Hope Works (Pty) Ltd				16:30:20	test another call email	ADM	Administration					
() Hold	E CN0000972	Hope Works (Pty) Ltd		Awaiting Acceptance		15:57:00	Test new call for email description in body	CR						
Pending	E CN0000971	Westwood Dynamic		UnAssigned		03:00:00	BathBinNaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
O Complete	E CN0000970	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
O AL	E CN0000959	Hope Works (Pty) Ltd		Unitssigned		03:00:00	Tier - Connectal Tier Test	INST	Installation				Forest Hills Centre	
tioemfontein	E CN0000968	Green Tea Supples		UnAssigned		08:00:00	245 - 2 month service	54	Scheduled Maintenance			NEW 1234		
O New	E CN0000967	Westwood Dynamic		UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance			NEW 1254	Checkers Centre - Hildrest	
In Progress	E CN0000965	Westwood Dynamic Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
(j) Hold	E CN0000965	Westwood Dynamic Westwood Dynamic				08:00:00	BathBinMaint - Bathroom Bin Maintenance	5M	Scheduled Maintenance				Checkers Centre - Hildrest	
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O Al													uneoxers Centre - Hildrest	
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	E CN0000961	Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
	EE CN0000960	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
	E CN0000958	Westwood Dynamic		UnAssigned		03:00:00	BathSinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic		UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
		Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
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• Click on the **Edit** button.

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mation	EE CN0001003	Young Bectric		Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	E CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DB	Select Cal Type			19-12/1202		
New Year	E CN0001001	Young Bectric		UnAssigned		11:29:19	Order the same part twice receive with different batch num	CR	Change Request			sin123		
 In Progress 	E CN0000995	Hope Works (Pty) Ltd		UnAssigned			ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
() Hold	> E CN0000992	Top Vehicle Hire		Asialting Acceptance	Daniel Balcowan	14:09:17	Loan machine for temporary high volume printing requirement		Service			TOP 12340LD		
Pending	E (N0000991	Apple Juice Inc		UnAssigned		16:38:15		DR	Select Cal Type					
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Pretoria	E CN0000988	Young Electric		UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
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Complete	E CN0000984	Hope Works (Pty) Ltd		UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
Q AI	E CN0000983	Hope Works (Pty) Ltd		UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Cape Town	E CN0000982	Young Electric		UnAssigned		06:00:35	Test elapsed hours 1	TEST	Testing			sin123		
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In Progress	E CN0000974	Hope Works (Pty) Ltd		Amaiting Acceptance		56:30:20	test another call email	ADM	Administration			095011015		
🕑 Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
O Al	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
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O New	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
In Progress	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
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Complete	E CN0000964	Hack PC - IT Shop		UnAssigned		03:00:00	245 - 2 month service	514	Scheduled Maintenance			147807		
Q Al	E (N0000963	Westwood Dynamic		UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
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	E CN0000960	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
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	E CN0000956	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
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	E CN0000954	Green Tea Supplies	17/09/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
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	Count: 386													

- The **Call maintenance: Call ref. [call number]** screen will be displayed.
- Click on the **Credit Notes** tile.



Calls - Add a Credit Note

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CREDIT NOTE LISTING

- The Sales Credit Notes for Call [call number] screen will be displayed.
- Click on Add.

Help v2024.5.0.7/1.0 - Pg 5 - Printed: 04/07/2024



Calls - Add a Credit Note

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					Custome	rCode	CustomerNar	ne C)NoteStatusDesc	CrNoteDesc	ription	Currency	Exchang	eRate	TaxRate	CrNote	sDate (OrNoteTime	Salesm	anEmpl
Fund	tions		*																	

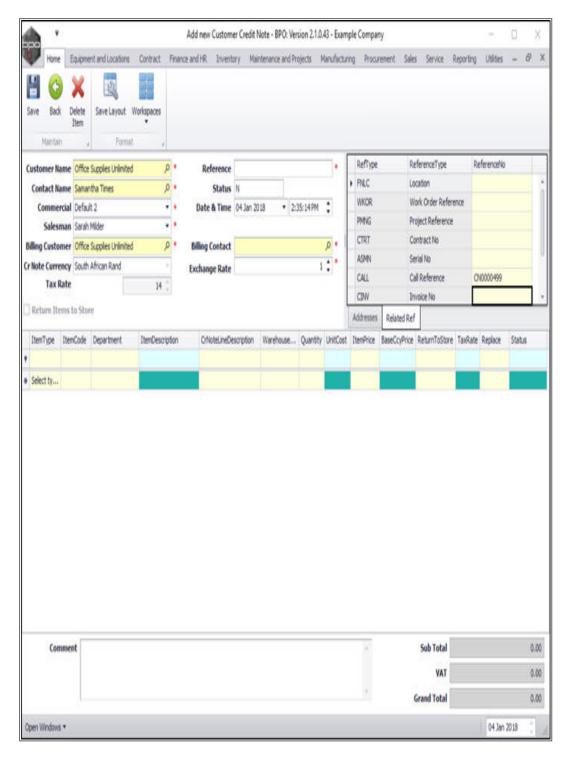
- The Add new Customer Credit Note screen will be displayed.
- Click on the **Related References** tab.



				Add n	ew Custom	er Credit I	Note - BPO:	Version 2.1.0	143 - Exam	ple Compar	1ý					>
Hone E	quipment	and Locations	Contract I	Finance and H	R Invent	ny Mai	ntenance an	d Projects	Manufacturi	ng Procu	rement Sa	les Service	Reporting	Utilities	$\langle \hat{a} \rangle$	Ø
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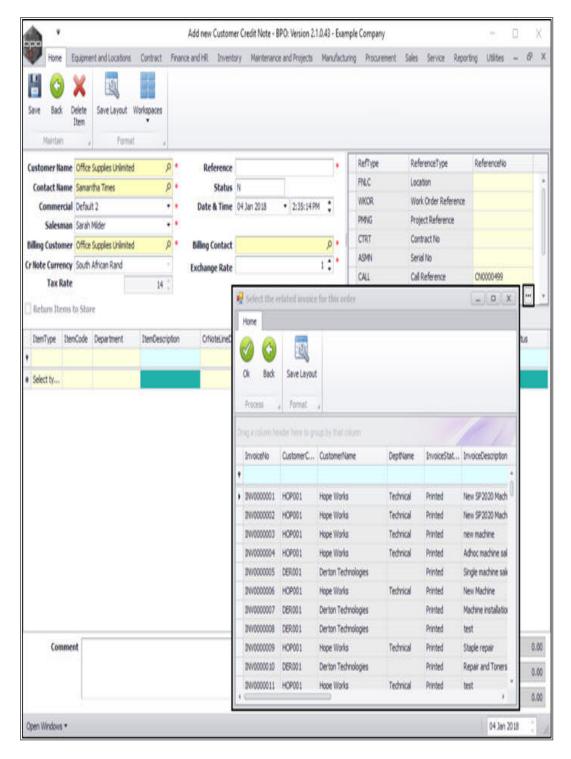


- The Related References panel will be **expanded**.
- Click in the **text box** under the **Reference No.** column, in the **Invoice No.** row.



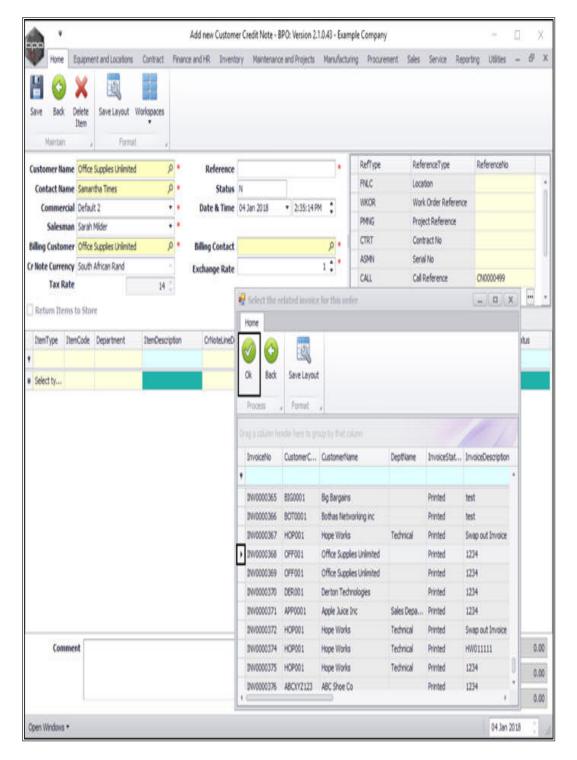


- An ellipsis [...] button will be revealed.
- Click on this ellipsis button to display a **Select the related invoice for this order** pop up screen.





- Click on the **row selector** in front of the **invoice** that you wish to **raise a credit note** for.
- Click on Ok.



Help v2024.5.0.7/1.0 - Pg 10 - Printed: 04/07/2024



- The selected invoice details will populate the **Items** data grid in the credit note screen.
- If a **stock item** was invoiced, a message box will pop up asking;
 - Do you wish to return the items to store?
- If you **do** want to return the items (if, for example, the incorrect part was invoiced) then click on **Yes**.
 - Note: Remember that you still need to return the stock using the Return Request screen, when the credit note is authorised and printed.



					Add new Custom	er Credit I	Note - BPO: \	Version 2.1.0.	43 - Exam	ple Compar	iy.				D.	X
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 If you have selected to Return the Item to Store, then a Return Processing message box will pop up, asking:



- Do the items being returned to the store need to be replaced?
- Select Yes If the part issued was the correct part, but is damaged / or has the incorrect serial number, and a new part of the same part code needs to be issued.
 - Note: Once the part has been returned to store, the part request will re-open to be fulfilled - a new part / correct serial number must be issued.
- Select **No** If you issued the incorrect part, or the order is cancelled.
 - Note: This will set the part request required quantity to zero as it is no longer required.



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• If you **not** do want to return the items to store (if, for example, the incorrect selling price was charged) then click on **No**.



					Add new Custom	er Credit N	lote - BPO: \	Version 2.1.0.	43 - Exam	ple Compar	ý.				D.	X
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• You do have the option to use the **Return Items to Store** flag if you made the incorrect choice.



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• When you click on the **Return Items to Store** check box, a **Return Processing** screen will pop up asking;



- Do the items being returned to the store need to be replaced?
- You now have the opportunity to correct your previous choice, if required, and click on **Yes**.



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- In the Items data grid, each **part** line item will show whether;
 - a part will be **returned to stores** or,
 - a **replacement part** is required.



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• Ensure you have a **Reference** and **Comment** relating to the **reason** for this credit note.



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idect t •		Sales Department	Back toner \$P2020	Black toner \$P2020	Main Warehouse	1.00	457.	43 526.0		Yes Sub Total	14.	20 Yes	A	520

• In the **Related References** panel, **scroll down** until you can view the **Reason Code** row.

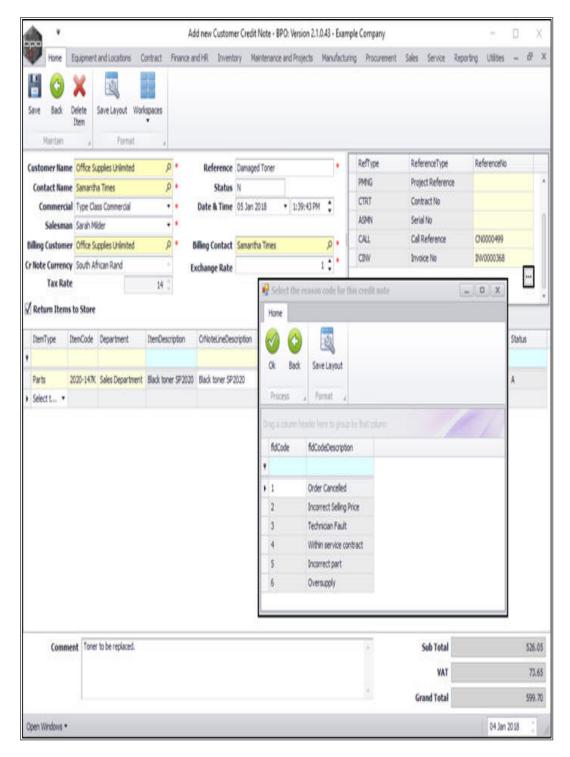


• Click in the **text box** under the **Reference No.** column, in the **Reason Code** row.

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- An ellipsis [...] button will be revealed.
- Click on this ellipsis button to display a **Select the reason code** for this credit note pop up screen.





- Click on the **row selector** in front of the **reason code** that you wish to **select** for this **credit note**.
- Click on **Ok**.
- Note: If no codes have not yet been configured, or the code that you need to use has not been set up, then this needs to be added in Static Data: <u>Credit Note Reason</u>.



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• The selected reason code will now populate the Related References panel.



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• If you leave the credit note **as is** and click on Save, it will be credited it **in full**.



- Note: You can also do a <u>partial credit</u> <u>note</u>.
- Click on Save.

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- You will return to the **Sales Credit Notes for Call [call number]** listing screen where you can now view the new credit note.
 - Note: Complete the credit note process with the following steps:
 - Credit Note Approval Process
 - Return Stock to Store (if returning stock)



Calls - Add a Credit Note

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Related Topics

Edit Credit Note

Delete a Credit Note

Help v2024.5.0.7/1.0 - Pg 28 - Printed: 04/07/2024



Credit Note Approval Process

Return Stock to Store (if returning stock)

MNU.122.024

Help v2024.5.0.7/1.0 - Pg 29 - Printed: 04/07/2024

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