

SERVICE

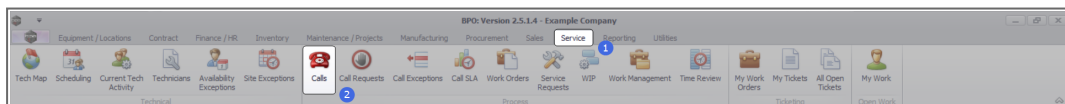
CALLS – ADD A CREDIT NOTE

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

Call Listing - RPD Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
IB CH0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ann Hilson	09:09:10	Test account balances	CR	Change Request			107		3
IB CH0001002	Sawmills Drive	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual	SR	Select Call Type			09-12/1202		3
IB CH0001001	Young Electric	26/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
IB CH0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:01:11	Order for a new printer	CR	Change Request			AT300000		3
IB CH0000992	Top Value Hire	20/10/2022	Awaiting Acceptance	Daniel Balgovan	14:05:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
IB CH0000991	Askle Judd Inc	24/10/2022	Unassigned		05:38:15	Contact Closure - C0000054	SR	Select Call Type					3
IB CH0000989	Denton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
IB CH0000988	Young Electric	13/06/2022	Unassigned		09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
IB CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
IB CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
IB CH0000985	Hope Works (Pty) Ltd	13/06/2022	Unassigned		06:00:13	Test future call - for elapsed time	UPG	Upgrade			20-46765		3
IB CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT300000		3
IB CH0000983	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN23415546		3
IB CH0000982	Young Electric	13/06/2022	Unassigned		06:00:30	Test elapsed hours 1	TEST	Testing			an123		3
IB CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:04:28	Test with site manager email entered	ACH	Administration			107		3
IB CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	Test another call email	ACH	Administration			09501015		3
IB CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			09501015		3
IB CH0000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2
IB CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000964	Hack P.C. IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			147807		2
IB CH0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			18-30000		2
IB CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2

Count: 386

User : Bianca 30/03/2023 Version : 2.5.1.4 Example Company

- 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.

Call Listing - RPD Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
IB CH0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ann Hilson	09:09:10	Test account balances	CR	Change Request			107		3
IB CH0001002	Sawmills Drive	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual	SR	Select Call Type			09-12/1202		3
IB CH0001001	Young Electric	26/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
IB CH0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:01:11	Order for a new printer	CR	Change Request			AT300000		3
IB CH0000992	Top Value Hire	20/10/2022	Awaiting Acceptance	Daniel Balgovan	14:05:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
IB CH0000991	Askle Judd Inc	24/10/2022	Unassigned		05:38:15	Contact Closure - C0000054	SR	Select Call Type					3
IB CH0000989	Denton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
IB CH0000988	Young Electric	13/06/2022	Unassigned		09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
IB CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
IB CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
IB CH0000985	Hope Works (Pty) Ltd	13/06/2022	Unassigned		06:00:13	Test future call - for elapsed time	UPG	Upgrade			20-46765		3
IB CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT300000		3
IB CH0000983	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN23415546		3
IB CH0000982	Young Electric	13/06/2022	Unassigned		06:00:30	Test elapsed hours 1	TEST	Testing			an123		3
IB CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:04:28	Test with site manager email entered	ACH	Administration			107		3
IB CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	Test another call email	ACH	Administration			09501015		3
IB CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			09501015		3
IB CH0000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2
IB CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000964	Hack P.C. IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			147807		2
IB CH0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			18-30000		2
IB CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subfloor/Hall - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hillcrest	2
IB CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2

Count: 386

User : Bianca 30/03/2023 Version : 2.5.1.4 Example Company

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

Call Listing - BPO Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BI CH0001003	Young Electric	12/12/2022	Awaiting Acceptance	Ann Hilborn	09:09:10	Test account balance	CR	Change Request			an123	Checkers Centre - Hilborn	3
BI CH0001002	Semantic Drive	12/12/2022	Awaiting Acceptance	Nery Thompson	08:38:20	Test call for account balance manual	SR	Select Call Type			SR-12/12/22	Checkers Centre - Hilborn	3
BI CH0001001	Young Electric	26/11/2022	Unassigned		11:26:19	Order the same part twice receive with different batch num.	CR	Change Request			an123	Checkers Centre - Hilborn	3
BI CH0000998	Top Value Hire	25/10/2022	Unassigned		14:08:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD	Forest Hills Centre	3
BI CH0000991	Apple Juice Inc	24/09/2022	Unassigned		09:36:15	Contact Closure - C00000059	SR	Select Call Type					2
BI CH0000989	Derton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222	Checkers Centre - Hilborn	3
BI CH0000988	Young Electric	01/06/2022	Unassigned		09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123	Checkers Centre - Hilborn	3
BI CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123	Checkers Centre - Hilborn	3
BI CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			SR-12/12/22	Checkers Centre - Hilborn	3
BI CH0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-86765	Checkers Centre - Hilborn	3
BI CH0000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47300000	Checkers Centre - Hilborn	3
BI CH0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SR02413546	Checkers Centre - Hilborn	3
BI CH0000982	Young Electric	10/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			an123	Checkers Centre - Hilborn	3
BI CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:29	Test with site manager email entered	ADM	Administration			107	Checkers Centre - Hilborn	3
BI CH0000974	Hope Works (Pty) Ltd	30/11/2019	Awaiting Acceptance	Bianca Du Toit	06:36:20	Test another call email	ADM	Administration			095013015	Checkers Centre - Hilborn	3
BI CH0000972	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			095013015	Checkers Centre - Hilborn	3
BI CH0000971	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	SRV - 2 month service	SR	Scheduled Maintenance			NEW1234	Checkers Centre - Hilborn	2
BI CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	SRV - 2 month service	SR	Scheduled Maintenance			147807	Checkers Centre - Hilborn	2
BI CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	SRV - 2 month service	SR	Scheduled Maintenance			18-30300	Checkers Centre - Hilborn	2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000955	Hope Works (Pty) Ltd	16/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	SRV - 2 month service	SR	Scheduled Maintenance			NEW1234	Checkers Centre - Hilborn	2

Count: 306

- Click on the **Edit** button.

Call Listing - BPO Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BI CH0001003	Young Electric	12/12/2022	Awaiting Acceptance	Ann Hilborn	09:09:10	Test account balance	CR	Change Request			an123	Checkers Centre - Hilborn	3
BI CH0001002	Semantic Drive	12/12/2022	Awaiting Acceptance	Nery Thompson	08:38:20	Test call for account balance manual	SR	Select Call Type			SR-12/12/22	Checkers Centre - Hilborn	3
BI CH0001001	Young Electric	26/11/2022	Unassigned		11:26:19	Order the same part twice receive with different batch num.	CR	Change Request			an123	Checkers Centre - Hilborn	3
BI CH0000998	Top Value Hire	25/10/2022	Awaiting Acceptance	Daniel Balgoveen	14:08:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD	Forest Hills Centre	3
BI CH0000991	Apple Juice Inc	24/09/2022	Unassigned		09:36:15	Contact Closure - C00000059	SR	Select Call Type					2
BI CH0000989	Derton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222	Checkers Centre - Hilborn	3
BI CH0000988	Young Electric	01/06/2022	Unassigned		09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123	Checkers Centre - Hilborn	3
BI CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123	Checkers Centre - Hilborn	3
BI CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			SR-12/12/22	Checkers Centre - Hilborn	3
BI CH0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-86765	Checkers Centre - Hilborn	3
BI CH0000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47300000	Checkers Centre - Hilborn	3
BI CH0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SR02413546	Checkers Centre - Hilborn	3
BI CH0000982	Young Electric	10/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			an123	Checkers Centre - Hilborn	3
BI CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:29	Test with site manager email entered	ADM	Administration			107	Checkers Centre - Hilborn	3
BI CH0000974	Hope Works (Pty) Ltd	30/11/2019	Awaiting Acceptance	Bianca Du Toit	06:36:20	Test another call email	ADM	Administration			095013015	Checkers Centre - Hilborn	3
BI CH0000972	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			095013015	Checkers Centre - Hilborn	3
BI CH0000971	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	SRV - 2 month service	SR	Scheduled Maintenance			NEW1234	Checkers Centre - Hilborn	2
BI CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	SRV - 2 month service	SR	Scheduled Maintenance			147807	Checkers Centre - Hilborn	2
BI CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	SRV - 2 month service	SR	Scheduled Maintenance			18-30300	Checkers Centre - Hilborn	2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
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BI CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bn Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilborn	2
BI CH0000955	Hope Works (Pty) Ltd	16/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	SRVT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	SRV - 2 month service	SR	Scheduled Maintenance			NEW1234	Checkers Centre - Hilborn	2

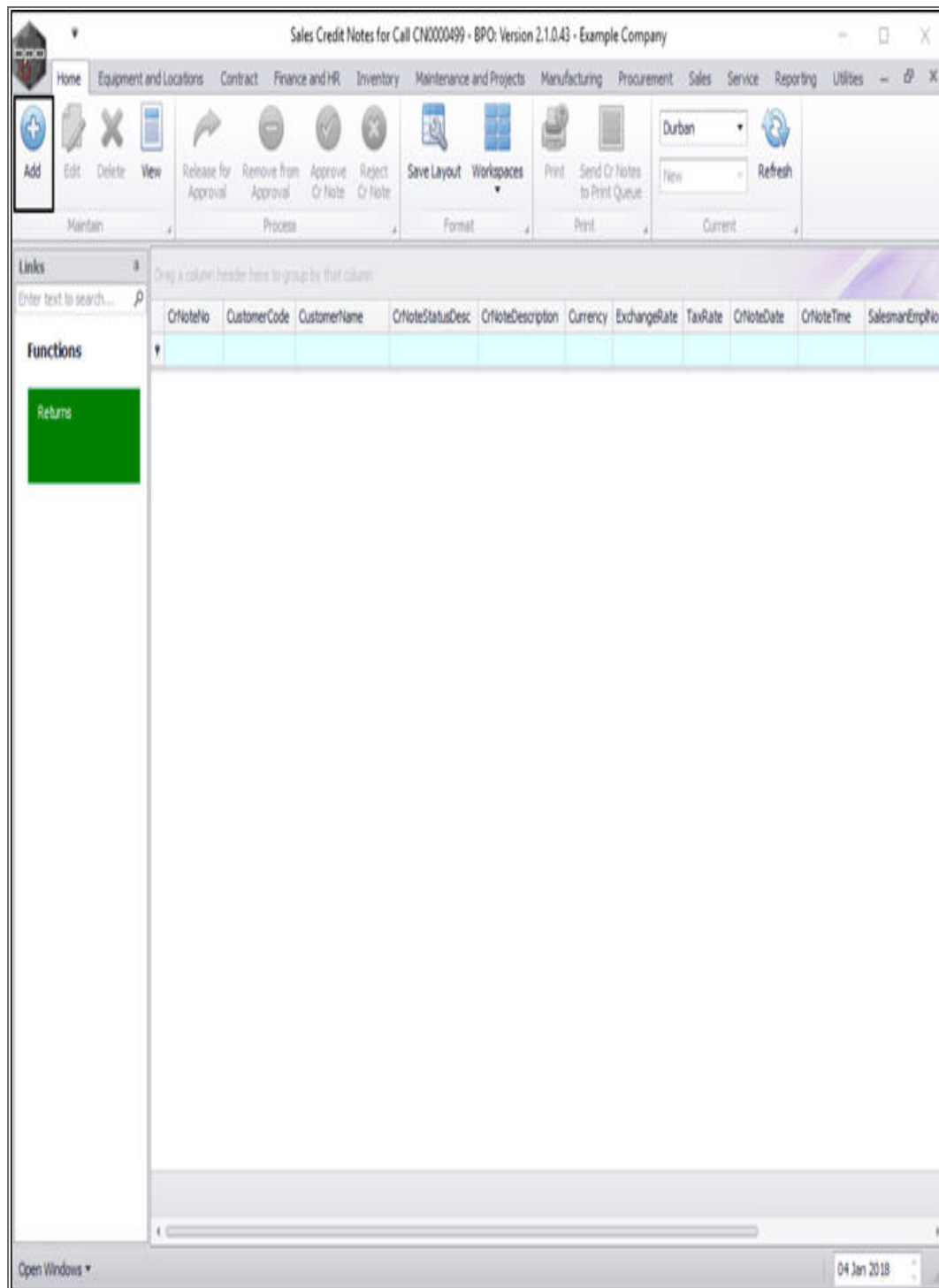
Count: 306

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

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CREDIT NOTE LISTING

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



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

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Office Supplies Unlimited Reference

Contact Name Samantha Times Status N

Commercial Default 2 Date & Time 04 Jan 2018 2:35:14 PM

Salesman Sarah Milder

Billing Customer Office Supplies Unlimited Billing Contact

Cr Note Currency South African Rand Exchange Rate 1

Tax Rate 14

Billing address PO Box 9632 Forest Hills 12345

Shipping address

Return Items to Store

Addresses Related Ref

ItemType	ItemCode	Department	ItemDescription	CrNoteLineDescription	Warehouse...	Quantity	UnitCost	ItemPrice	BaseCcyPrice	ReturnToStore	TaxRate	Replace	Status
Select by...													

Comment

Sub Total 0.00

VAT 0.00

Grand Total 0.00

Open Windows 04 Jan 2018

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

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Office Supplies Unlimited Reference ReferenceType ReferenceNo
 Contact Name Samantha Times Status N
 Commercial Default 2 Date & Time 04 Jan 2018 2:35:14 PM
 Salesman Sarah Milder
 Billing Customer Office Supplies Unlimited Billing Contact
 Cr Note Currency South African Rand Exchange Rate
 Tax Rate 14

Return Items to Store

RefType	ReferenceType	ReferenceNo
PHLC	Location	
WKOR	Work Order Reference	
PMNG	Project Reference	
CTRT	Contract No	
ASMN	Serial No	
CALL	Call Reference	CH0000499
CIW	Invoice No	

Addresses Related Ref

ItemType	ItemCode	Department	ItemDescription	CrNoteLineDescription	Warehouse...	Quantity	UnitCost	ItemPrice	BaseCcyPrice	ReturnToStore	TaxRate	Replace	Status
Select ty...													

Comment

Sub Total 0.00
 VAT 0.00
 Grand Total 0.00

Open Windows 04 Jan 2018

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

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Customer Name Office Supplies Unlimited Reference
 Contact Name Samantha Times Status N
 Commercial Default 2 Date & Time 04 Jan 2018 2:35:14 PM
 Salesman Sarah Milder
 Billing Customer Office Supplies Unlimited Billing Contact
 Cr Note Currency South African Rand Exchange Rate
 Tax Rate 14

Return Items to Store

ItemType	ItemCode	Department	ItemDescription	CrNoteLine
Select ty...				

RefType ReferenceType ReferenceNo

FINC	Location	
WKOR	Work Order Reference	
PMNG	Project Reference	
CTRT	Contract No	
ASMN	Serial No	
CALL	Call Reference	CH0000499

Select the related invoice for this order

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

InvoiceNo	CustomerC...	CustomerName	DeptName	InvoiceStat...	InvoiceDescription
BW0000001	HOP001	Hope Works	Technical	Printed	New SP2020 Mach
BW0000002	HOP001	Hope Works	Technical	Printed	New SP2020 Mach
BW0000003	HOP001	Hope Works	Technical	Printed	new machine
BW0000004	HOP001	Hope Works	Technical	Printed	Adhoc machine sal
BW0000005	DER001	Derton Technologies		Printed	Single machine sal
BW0000006	HOP001	Hope Works	Technical	Printed	New Machine
BW0000007	DER001	Derton Technologies		Printed	Machine installat
BW0000008	DER001	Derton Technologies		Printed	test
BW0000009	HOP001	Hope Works	Technical	Printed	Staple repair
BW0000010	DER001	Derton Technologies		Printed	Repair and Toners
BW0000011	HOP001	Hope Works	Technical	Printed	test

Comment

Open Windows 04 Jan 2018

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

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Customer Name Office Supplies Unlimited Reference
Contact Name Samantha Times Status N
Commercial Default 2 Date & Time 04 Jan 2018 2:35:14 PM
Salesman Sarah Milder
Billing Customer Office Supplies Unlimited Billing Contact
Cr Note Currency South African Rand Exchange Rate
Tax Rate 14

RefType ReferenceType ReferenceNo
FRLC Location
WVOR Work Order Reference
PMNG Project Reference
CTRT Contract No
ASMN Serial No
CALL Call Reference CH0000499

Return Items to Store

ItemType	ItemCode	Department	ItemDescription	CrNoteLineD
Select ty...				

Select the related invoice for this order

Home
Ok Back Save Layout
Process Format

Drag a column header here to group by that column

InvoiceNo	CustomerC...	CustomerName	DeptName	InvoiceStat...	InvoiceDescription
INV0000365	BIG0001	Big Bargains		Printed	test
INV0000366	BOT0001	Bothas Networking inc		Printed	test
INV0000367	HOP001	Hope Works	Technical	Printed	Swap out Invoice
INV0000368	OFF001	Office Supplies Unlimited		Printed	1234
INV0000369	OFF001	Office Supplies Unlimited		Printed	1234
INV0000370	DER001	Derton Technologies		Printed	1234
INV0000371	APP0001	Apple Juice Inc	Sales Depa...	Printed	1234
INV0000372	HOP001	Hope Works	Technical	Printed	Swap out Invoice
INV0000374	HOP001	Hope Works	Technical	Printed	HW011111
INV0000375	HOP001	Hope Works	Technical	Printed	1234
INV0000376	ABCKY2123	ABC Shoe Co		Printed	1234

Comment

Open Windows 04 Jan 2018

- 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 Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Office Supplies Unlimited Reference
 Contact Name Samantha Times Status N
 Commercial Type Class Commercial Date & Time 05 Jan 2018 12:39:30 PM
 Salesman Sarah Milder Billing Contact Samantha Times
 Billing Customer Office Supplies Unlimited Exchange Rate 1
 Cr Note Currency South African Rand
 Tax Rate 14

☐ Return Items to Store

Addresses Related Ref

ItemType	ItemCode	Department	ItemDescription	CrNoteLineDescription	Warehouse...	Quantity	UnitCost	ItemPrice	BaseCcyPrice	ReturnToStore	TaxRate	Replace	Status
Parts	2020-147K	Sales Department	Black toner SP2020	Black toner SP2020	Main Wareh...	1.00	457.43	\$26.05	\$26.05	No	14.00	No	A
Select ty...													

Parts Processing

Do you wish to return the items to the store?

Yes No

Comment

Sub Total 526.05
 VAT 73.65
 Grand Total 599.70

Open Windows 04 Jan 2018

- 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.

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Customer Name Office Supplies Unlimited Reference
 Contact Name Samantha Times Status N
 Commercial Type Class Commercial Date & Time 05 Jan 2018 12:39:30 PM
 Salesman Sarah Milder Billing Contact Samantha Times
 Cr Note Currency South African Rand Exchange Rate 1
 Tax Rate 14

☒ Return Items to Store

Item Type	Item Code	Department	Item Description	Cr Note Line Description	Warehouse...	Quantity	Unit Cost	Item Price	Base Ccy Price	Return To Store	Tax Rate	Replace	Status
Parts	2020-147K	Sales Department	Black toner SP2020	Black toner SP2020	Main Wareh...	1.00	457.43	526.05	526.05	No	14.00	No	A
Select ty...													

Return Processing

Do the items being returned to the store need to be replaced?

Yes No

Comment

Sub Total 526.05
 VAT 73.65
 Grand Total 599.70

Open Windows 04 Jan 2018

- 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 Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Office Supplies Unlimited Reference
 Contact Name Samantha Times Status N
 Commercial Type Class Commercial Date & Time 05 Jan 2018 12:39:30 PM
 Salesman Sarah Milder
 Billing Customer Office Supplies Unlimited Billing Contact Samantha Times
 Cr Note Currency South African Rand Exchange Rate 1
 Tax Rate 14

☐ Return Items to Store

Addresses Related Ref

ItemType	ItemCode	Department	ItemDescription	CrNoteLineDescription	Warehouse...	Quantity	UnitCost	ItemPrice	BaseCcyPrice	ReturnToStore	TaxRate	Replace	Status
Parts	2020-147K	Sales Department	Black toner SP2020	Black toner SP2020	Main Wareh...	1.00	457.43	\$26.05	\$26.05	No	14.00	No	A
Select ty...													

Parts Processing

Do you wish to return the items to the store?

Yes No

Comment

Sub Total 526.05
 VAT 73.65
 Grand Total 599.70

Open Windows 04 Jan 2018

- You do have the option to use the **Return Items to Store** flag if you made the incorrect choice.

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Office Supplies Unlimited Reference
Contact Name Samantha Times Status N
Commercial Type Class Commercial Date & Time 05 Jan 2018 1:39:43 PM
Salesman Sarah Milder
Billing Customer Office Supplies Unlimited Billing Contact Samantha Times
Cr Note Currency South African Rand Exchange Rate 1
Tax Rate 14

☐ Return Items to Store

RefType	ReferenceType	ReferenceNo
WVOR	Work Order Reference	
PMNG	Project Reference	
CTRT	Contract No	
ASMN	Serial No	
CALL	Call Reference	CN0000499
ICIV	Invoice No	INV0000368
REAS	Reason Code	

Item Type	Item Code	Department	Item Description	Cr Note Line Description	Warehouse...	Quantity	Unit Cost	Item Price	Base Ccy Price	Return To Store	Tax Rate	Replace	Status
Parts	2020-147K	Sales Department	Black toner SP2020	Black toner SP2020	Main Wareh...	1.00	457.43	\$26.05	\$26.05	No	14.00	No	A
Select ty...													

Comment

Sub Total 526.05
VAT 73.65
Grand Total 599.70

Open Windows 04 Jan 2018

- 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**.

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name: Office Supplies Unlimited
 Contact Name: Samantha Times
 Commercial: Type Class Commercial
 Salesman: Sarah Milder
 Billing Customer: Office Supplies Unlimited
 Cr Note Currency: South African Rand
 Tax Rate: 14

Reference:
 Status: N
 Date & Time: 05 Jan 2018 1:39:43 PM
 Billing Contact: Samantha Times
 Exchange Rate: 1

RefType	ReferenceType	ReferenceNo
WKOR	Work Order Reference	
PMNG	Project Reference	
CTRT	Contract No	
ASMN	Serial No	
CALL	Call Reference	CH0000499
CDIV	Invoice No	INV0000368
REAS	Reason Code	

☒ Return Items to Store

ItemType	ItemCode	Department	ItemDescription	CrNoteLineDescription	Warehouse...	Quantity	UnitCost	ItemPrice	BaseCcyPrice	ReturnToStore	TaxRate	Replace	Status
Parts	2020-147K	Sales Department	Black toner SP2020	Black toner SP2020	Main Wareh...	1.00	457.43	\$26.05	\$26.05	No	14.00	No	A
Select ty...													

Return Processing

Do the items being returned to the store need to be replaced?

Yes No

Comment

Sub Total: 526.05
 VAT: 73.65
 Grand Total: 599.70

Open Windows 04 Jan 2018

- 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.

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Office Supplies Unlimited Reference
 Contact Name Samantha Times Status N
 Commercial Type Class Commercial Date & Time 05 Jan 2018 1:39:43 PM
 Salesman Sarah Milder Billing Contact Samantha Times
 Billing Customer Office Supplies Unlimited Exchange Rate
 Cr Note Currency South African Rand
 Tax Rate 14

☒ Return Items to Store

RefType	ReferenceType	ReferenceNo
WGOR	Work Order Reference	
PMNG	Project Reference	
CTRT	Contract No	
ASMN	Serial No	
CALL	Call Reference	CH0000499
CINV	Invoice No	INV0000368
REAS	Reason Code	

Item Type	Item Code	Department	Item Description	Cr/Note Line Description	Warehouse Name	Quantity	Unit Cost	Item Price	Base Ccy Price	Return To Store	Tax Rate	Replace	Status
Parts	2020-147K	Sales Department	Black toner SP2020	Black toner SP2020	Main Warehouse	1.00	457.43	\$26.05	\$26.05	Yes	14.00	Yes	A
Select type...													

Comment

Sub Total 526.05
 VAT 73.65
 Grand Total 599.70

Open Windows 04 Jan 2018

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

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Office Supplies Unlimited Reference Damaged Toner
 Contact Name Samantha Times Status N
 Commercial Type Class Commercial Date & Time 05 Jan 2018 1:39:43 PM
 Salesman Sarah Milder
 Billing Customer Office Supplies Unlimited Billing Contact Samantha Times
 Cr Note Currency South African Rand Exchange Rate 1
 Tax Rate 14

☒ Return Items to Store

RefType	ReferenceType	ReferenceNo
WKOR	Work Order Reference	
PMNG	Project Reference	
CTRT	Contract No	
ASMN	Serial No	
CALL	Call Reference	CH0000499
CINV	Invoice No	INV0000368
REAS	Reason Code	

Addresses Related Ref

ItemType	ItemCode	Department	ItemDescription	CrNoteLineDescription	WarehouseName	Quantity	UnitCost	ItemPrice	BaseCcyPrice	ReturnToStore	TaxRate	Replace	Status
Parts	2020-147X	Sales Department	Black toner SP2020	Black toner SP2020	Main Warehouse	1.00	457.43	526.05	526.05	Yes	14.00	Yes	A

Select L...

Comment Toner to be replaced.

Sub Total 526.05
 VAT 73.65
 Grand Total 599.70

Open Windows 04 Jan 2018

- 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.

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Office Supplies Unlimited Reference Damaged Toner
 Contact Name Samantha Times Status N
 Commercial Type Class Commercial Date & Time 05 Jan 2018 1:39:43 PM
 Salesman Sarah Milder
 Billing Customer Office Supplies Unlimited Billing Contact Samantha Times
 Cr Note Currency South African Rand Exchange Rate
 Tax Rate 14

☒ Return Items to Store

RefType	ReferenceType	ReferenceNo
PMNG	Project Reference	
CTRT	Contract No	
ASMN	Serial No	
CALL	Call Reference	CH0000499
CINV	Invoice No	INV0000368
REAS	Reason Code	

ItemType	ItemCode	Department	ItemDescription	CrNoteLineDescription	WarehouseName	Quantity	UnitCost	ItemPrice	BaseCcyPrice	ReturnToStore	TaxRate	Replace	Status
Parts	2020-147K	Sales Department	Black toner SP2020	Black toner SP2020	Main Warehouse	1.00	457.43	\$26.05	\$26.05	Yes	14.00	Yes	A

Select Item

Comment Toner to be replaced.

Sub Total 526.05
 VAT 73.65
 Grand Total 599.70

Open Windows 04 Jan 2018

- 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.

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Customer Name Office Supplies Unlimited Reference Damaged Toner RefType ReferenceType ReferenceNo
 Contact Name Samantha Times Status N PMNG Project Reference
 Commercial Type Class Commercial Date & Time 05 Jan 2018 1:39:43 PM CTRT Contract No
 Salesman Sarah Milder ASMN Serial No
 Billing Customer Office Supplies Unlimited Billing Contact Samantha Times CALL Call Reference CH0000499
 Cr Note Currency South African Rand Exchange Rate CINV Invoice No JHV0000368
 Tax Rate 14

☒ Return Items to Store

ItemType	ItemCode	Department	ItemDescription	CrNoteLineDescription
Parts	2020-147K	Sales Department	Black toner SP2020	Black toner SP2020
Select L...				

Select the reason code for this credit note

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column:

IdCode	IdCodeDescription
1	Order Cancelled
2	Incorrect Selling Price
3	Technician Fault
4	Within service contract
5	Incorrect part
6	Oversupply

Comment Toner to be replaced.

Sub Total \$26.05
 VAT 73.65
 Grand Total \$99.70

Open Windows 04 Jan 2018

- 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: [Credit Note Reason](#).

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Office Supplies Unlimited Reference Damaged Toner
 Contact Name Samantha Times Status N
 Commercial Type Class Commercial Date & Time 05 Jan 2018 1:39:43 PM
 Salesman Sarah Milder
 Billing Customer Office Supplies Unlimited Billing Contact Samantha Times
 Cr Note Currency South African Rand Exchange Rate 1
 Tax Rate 14

☒ Return Items to Store

ItemType	ItemCode	Department	ItemDescription	CrNoteLineDescription
Parts	2020-147X	Sales Department	Black toner SP2020	Black toner SP2020
Select...				

Select the reason code for this credit note

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

IdCode	IdCodeDescription
1	Order Cancelled
2	Incorrect Selling Price
3	Technician Fault
4	Within service contract
5	Incorrect part
6	Oversupply

Comment Toner to be replaced.

Sub Total 526.05
 VAT 73.65
 Grand Total 599.70

Open Windows 04 Jan 2018

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

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Office Supplies Unlimited Reference Damaged Toner
 Contact Name Samantha Times Status N
 Commercial Type Class Commercial Date & Time 05 Jan 2018 1:39:43 PM
 Salesman Sarah Milder
 Billing Customer Office Supplies Unlimited Billing Contact Samantha Times
 Cr Note Currency South African Rand Exchange Rate 1
 Tax Rate 14

☒ Return Items to Store

RefType	ReferenceType	ReferenceNo
PMNG	Project Reference	
CTRT	Contract No	
ASMN	Serial No	
CALL	Call Reference	OV000499
CINV	Invoice No	INV0000368
REAS	Reason Code	Incorrect part

ItemType	ItemCode	Department	ItemDescription	CrNoteLineDescription	WarehouseName	Quantity	UnitCost	ItemPrice	BaseCcyPrice	ReturnToStore	TaxRate	Replace	Status
Parts	2020-147K	Sales Department	Black toner SP2020	Black toner SP2020	Main Warehouse	1.00	457.43	526.05	526.05	Yes	14.00	Yes	A

Select 1...

Comment Toner to be replaced.

Sub Total 526.05
 VAT 73.65
 Grand Total 599.70

Open Windows 04 Jan 2018

- 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 partial credit note.
- Click on **Save**.

Add new Customer Credit Note - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces

Maintain Format

Customer Name Office Supplies Unlimited Reference Damaged Toner
 Contact Name Samantha Times Status N
 Commercial Type Class Commercial Date & Time 05 Jan 2018 1:39:43 PM
 Salesman Sarah Milder
 Billing Customer Office Supplies Unlimited Billing Contact Samantha Times
 Cr Note Currency South African Rand Exchange Rate 1
 Tax Rate 14

☒ Return Items to Store

RefType	ReferenceType	ReferenceNo
PMNG	Project Reference	
CTRT	Contract No	
ASMN	Serial No	
CALL	Call Reference	CH0000499
CINV	Invoice No	INV0000368
REAS	Reason Code	Incorrect part

ItemType	ItemCode	Department	ItemDescription	CrNoteLineDescription	WarehouseName	Quantity	UnitCost	ItemPrice	BaseCcyPrice	ReturnToStore	TaxRate	Replace	Status
Parts	2020-147K	Sales Department	Black toner SP2020	Black toner SP2020	Main Warehouse	1.00	457.43	526.05	526.05	Yes	14.00	Yes	A

Select t...

Comment Toner to be replaced.

Sub Total 526.05
 VAT 73.65
 Grand Total 599.70

Open Windows 04 Jan 2018

- 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)**

Sales Credit Notes for Call CH0000499 - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Release for Approval Remove from Approval Approve Or Note Reject Or Note Save Layout Workspaces Print Send Or Notes to Print Queue

Maintain Process Format Print Current

Links

Enter text to search...

Functions

Returns

Drag a column header here to group by that column

CrNoteNo	CustomerCode	CustomerName	CrNoteStatusDesc	CrNoteDescription	Currency	ExchangeRate	TaxRate	CrNoteDate	CrNoteTime	SalesmanEmpNo
CH0000100	OFF001	Office Supplies Unlimited	New	Damaged Toner	ZAR	1.00	14.00	05 Jan 2018	01:39:43	ML001

Open Windows 04 Jan 2018

Related Topics

[Edit Credit Note](#)

Delete a Credit Note

[Credit Note Approval Process](#)

[Return Stock to Store \(if returning stock\)](#)

MNU.122.024

