SERVICE

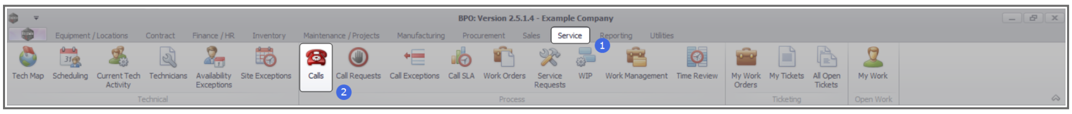
CALLS - ADD A CREDIT NOTE

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 Compatibility[1]. 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:

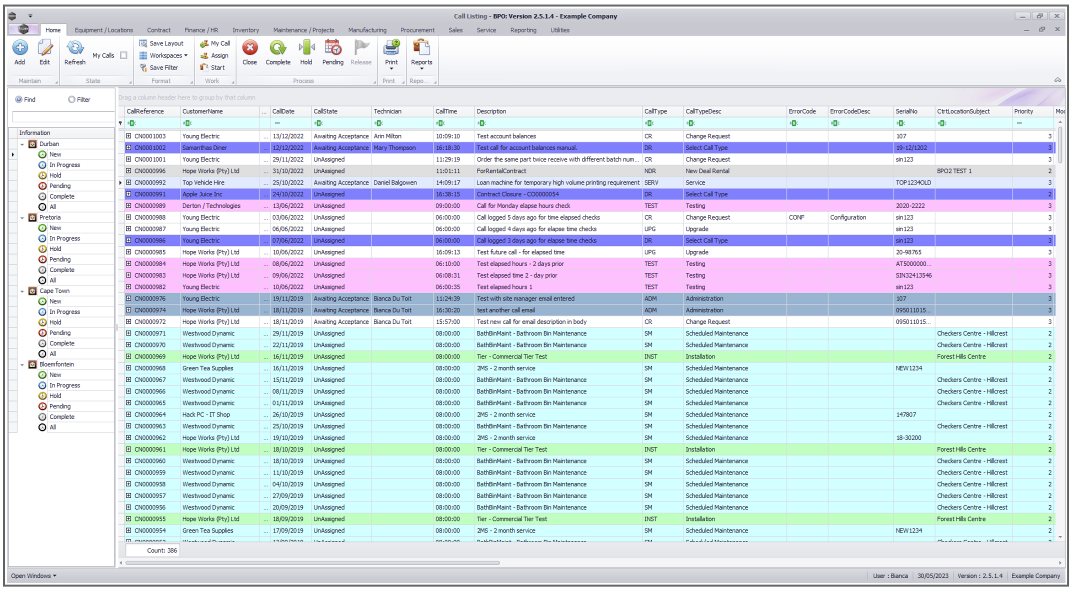
- Partial credit notes can be raised.
- Select whether or not to return the stock to store.
- If you select to return to store, you **must** complete a return request in order to move your stock back to the warehouse.
- When credit notes are raised in order to adjust incorrect pricing on an invoice,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

Ribbon Select ***Service > Calls***

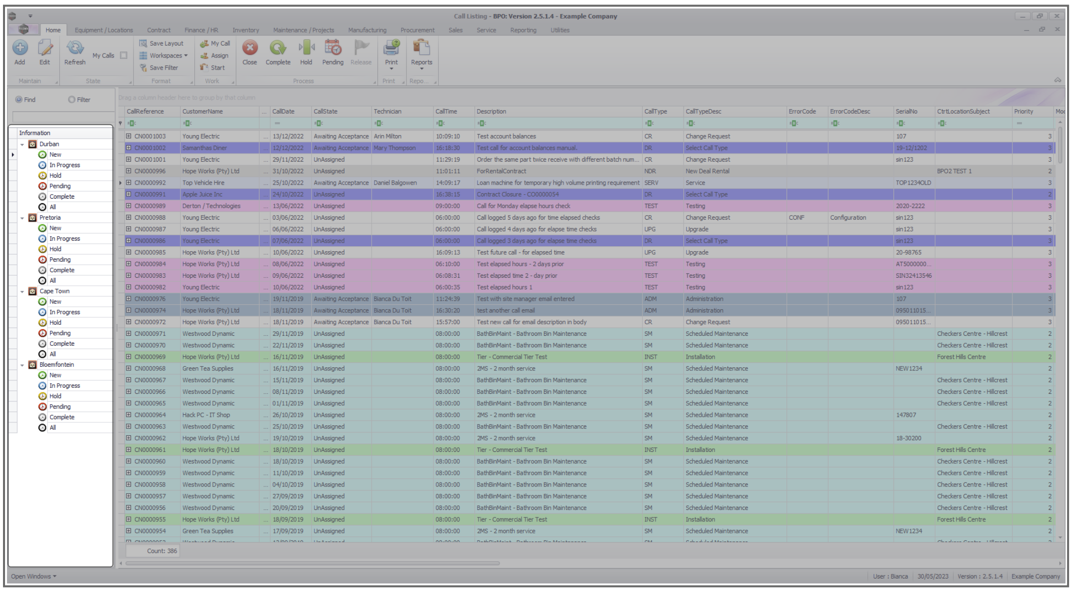


- The ***Call Listing*** screen will be displayed.

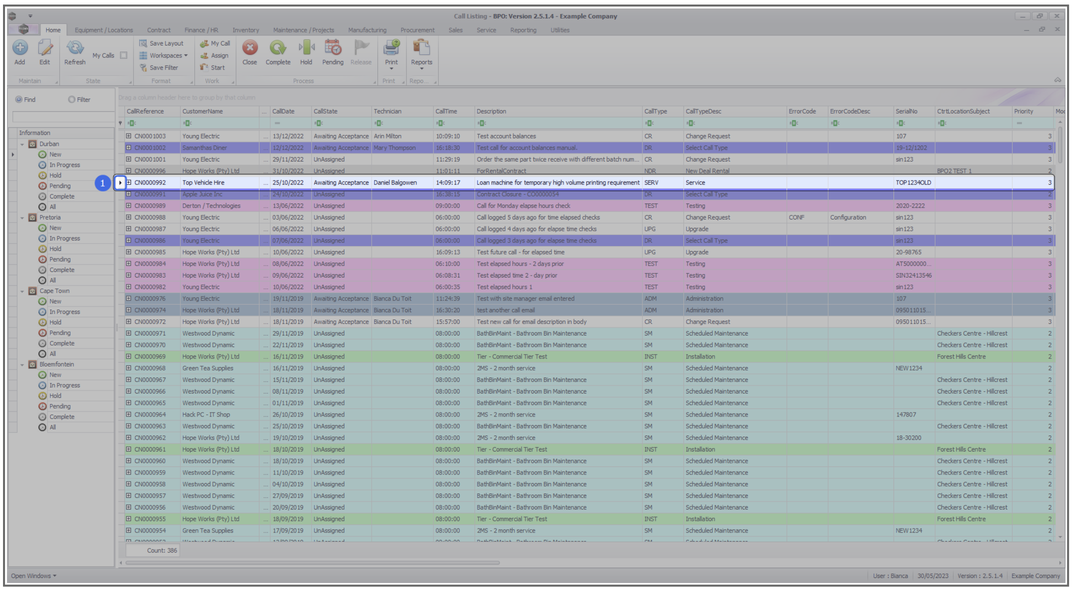
[1] BPO2 v2.5.1.3 or higher



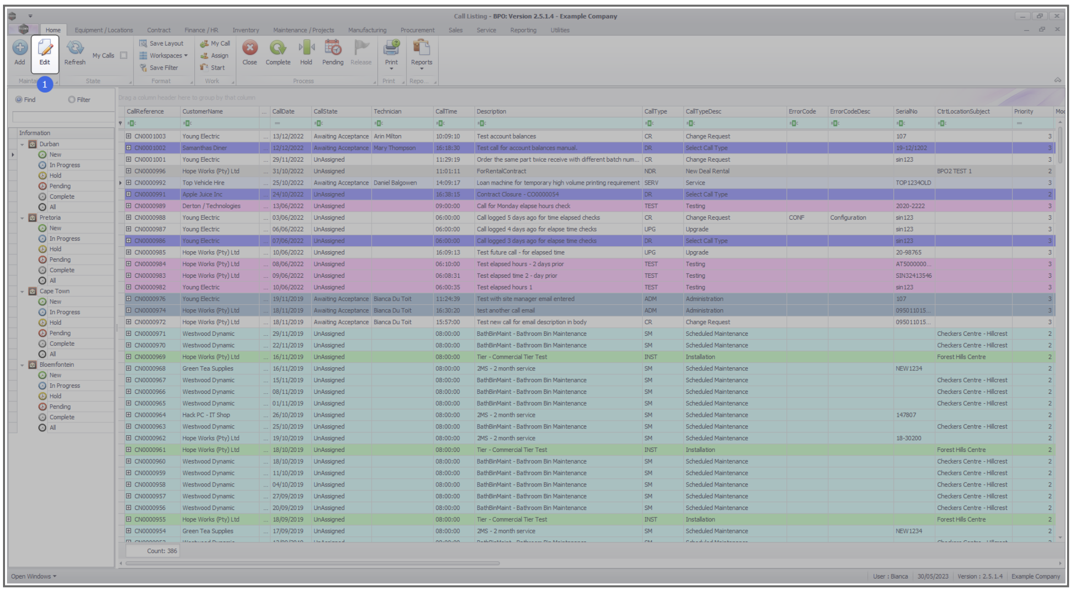
- The Calls are listed by ***Site*** and will display calls for the first Site listed.
- Click on the relevant ***Site*** for the calls you wish to view.



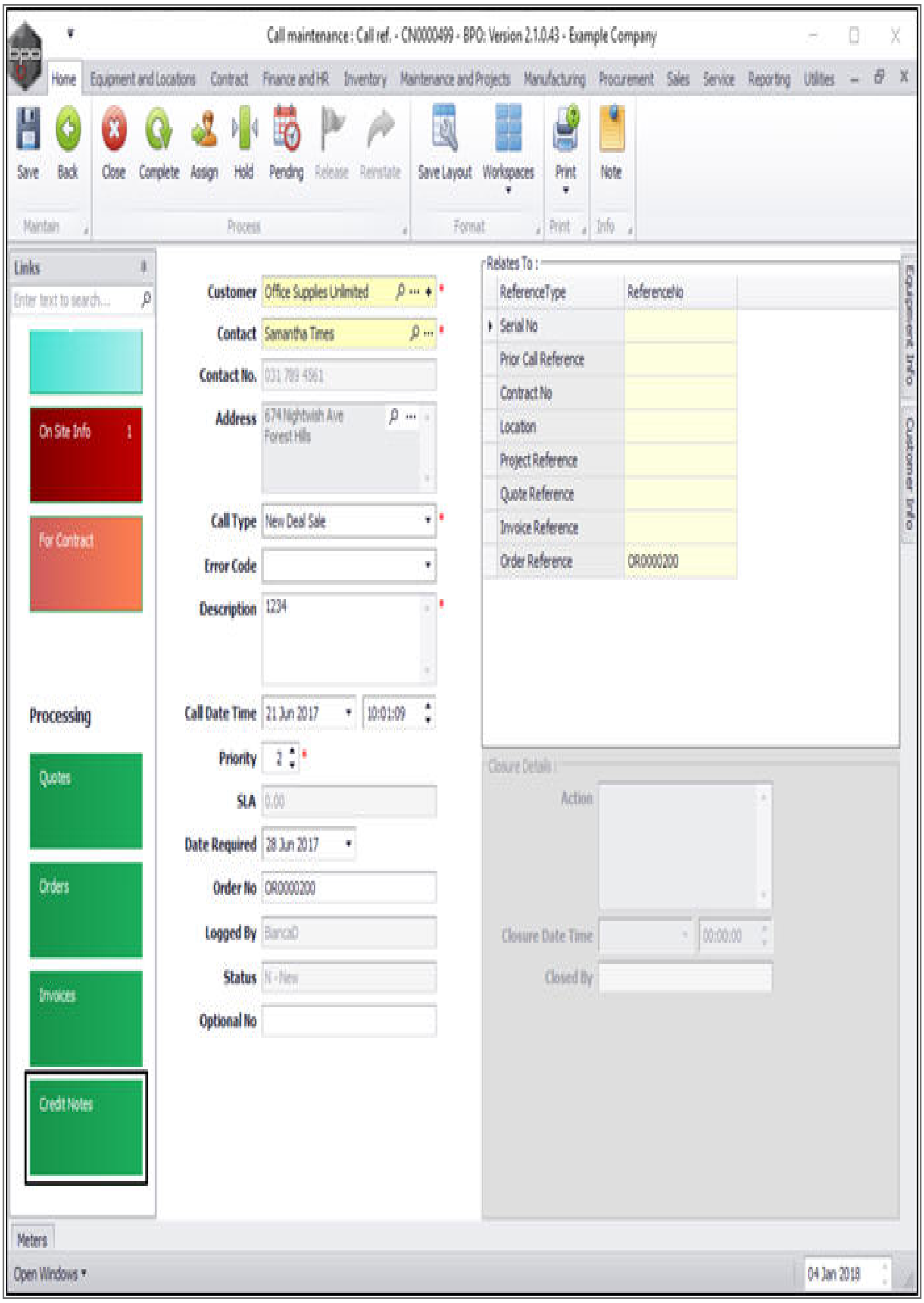
- Select the ***Call*** you wish to work with.



- Click on the ***Edit*** button.

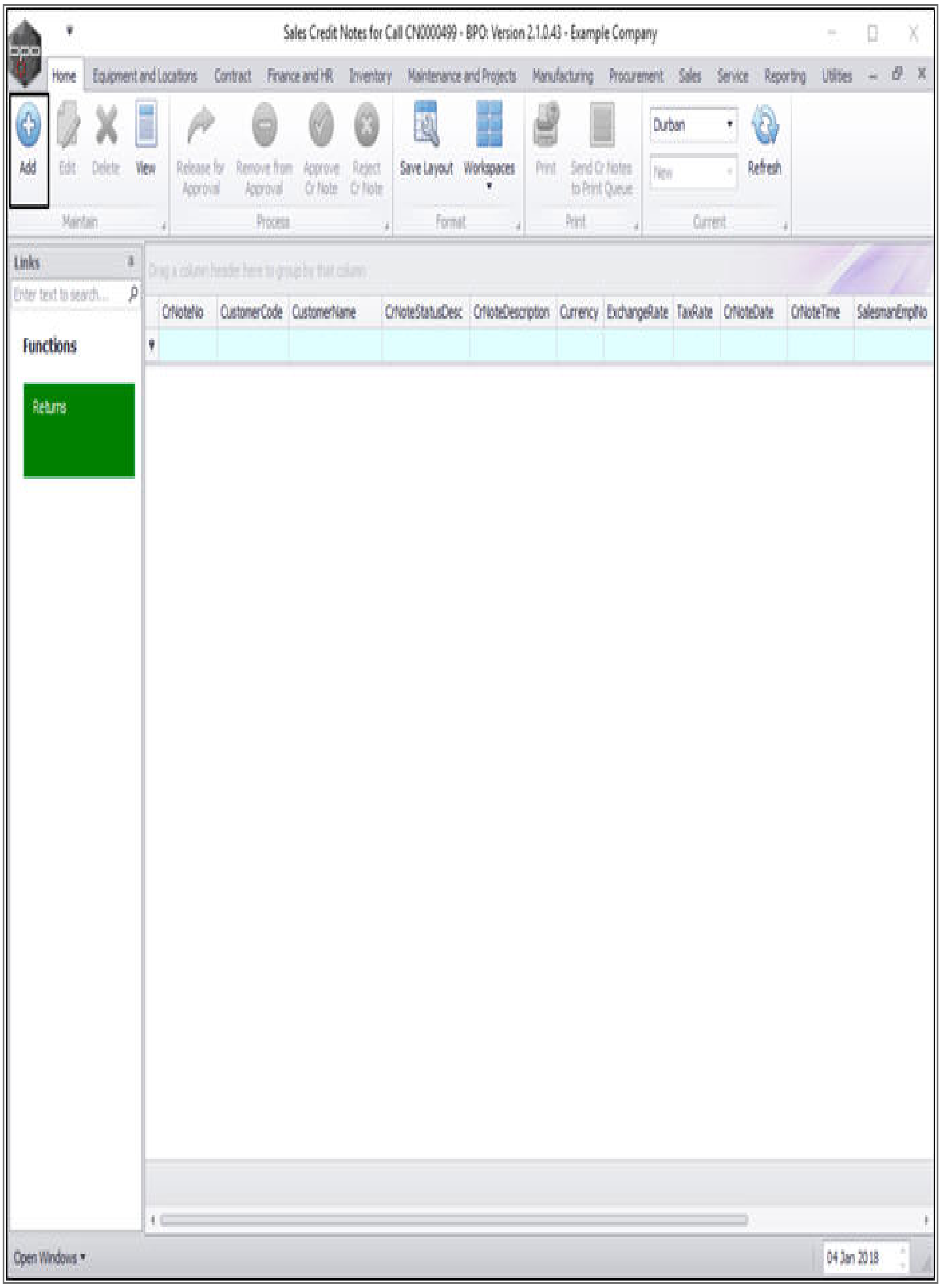


- The ***Call maintenance: Call ref. - [call number]*** screen will be displayed.
- Click on the ***Credit Notes*** tile.

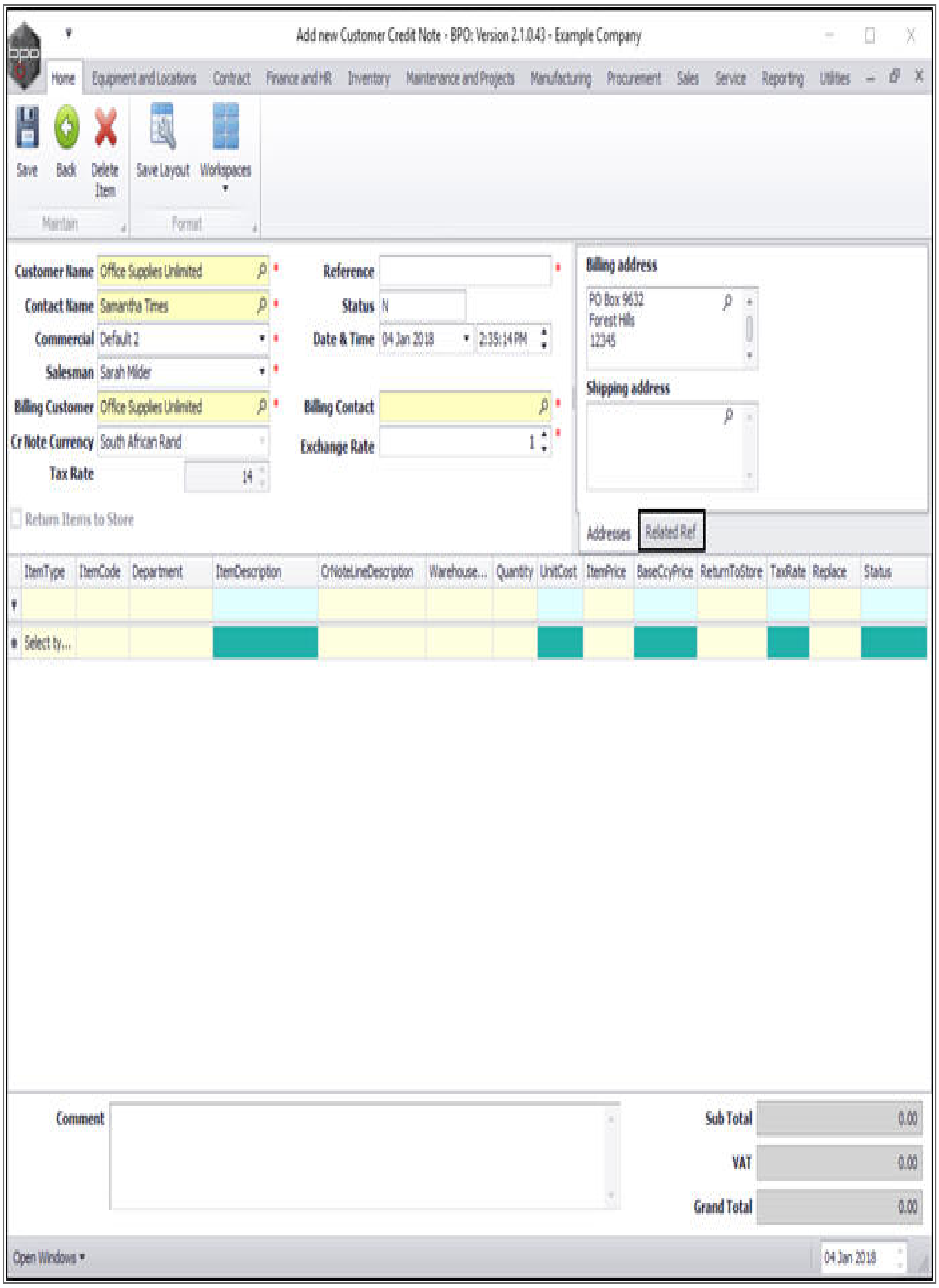

Call maintenance : Call ref. - CN0000499 - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Close
Complete
Assign
Hold
Pending
Release
Reinstate
Save Layout
Workspaces
Print
Note
Maintain
Process
Format
Print
Info
Links
On Site Info
For Contract
Processing
Quotes
Orders
Invoices
Credit Notes
Customer
Office Supplies Unlimited
Contact
Samantha Times
Contact No.
031 789 4561
Address
674 Nightwish Ave
Forest Hills
Call Type
New Deal Sale
Error Code
Description
1234
Call Date Time
21 Jun 2017
10:01:09
Priority
2
SLA
0.00
Date Required
28 Jun 2017
Order No
OR0000200
Logged By
BiancaD
Status
N - New
Optional No
Relates To :
ReferenceType
ReferenceNo
Serial No
Prior Call Reference
Contract No
Location
Project Reference
Quote Reference
Invoice Reference
Order Reference
OR0000200
Closure Details :
Action
Closure Date Time
00:00:00
Closed By
Equipment Info
Customer Info
Meters
Open Windows
04 Jan 2018

CREDIT NOTE LISTING

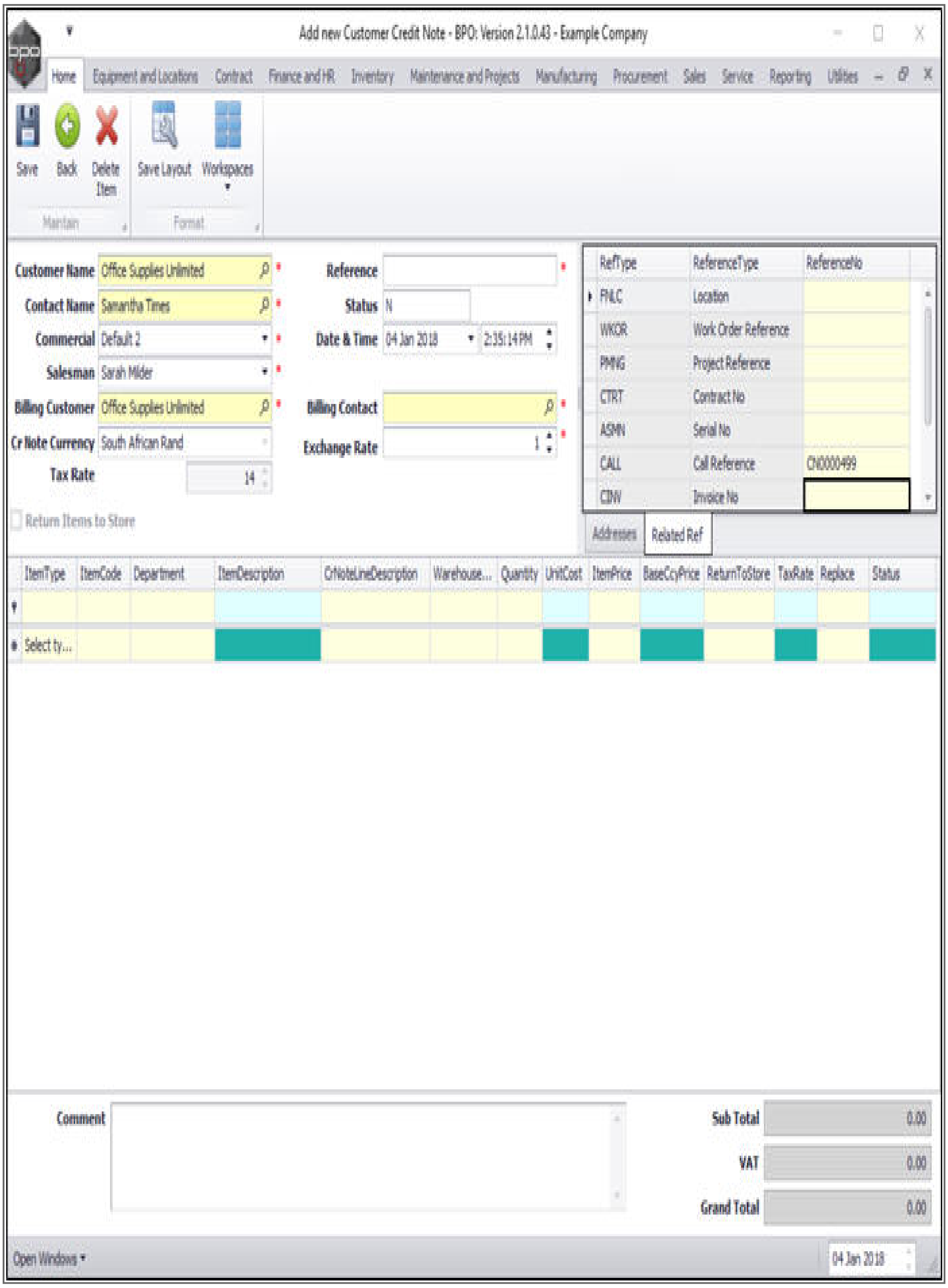
- The ***Sales Credit Notes for Call [call number]*** screen will be displayed.
- Click on ***Add***.



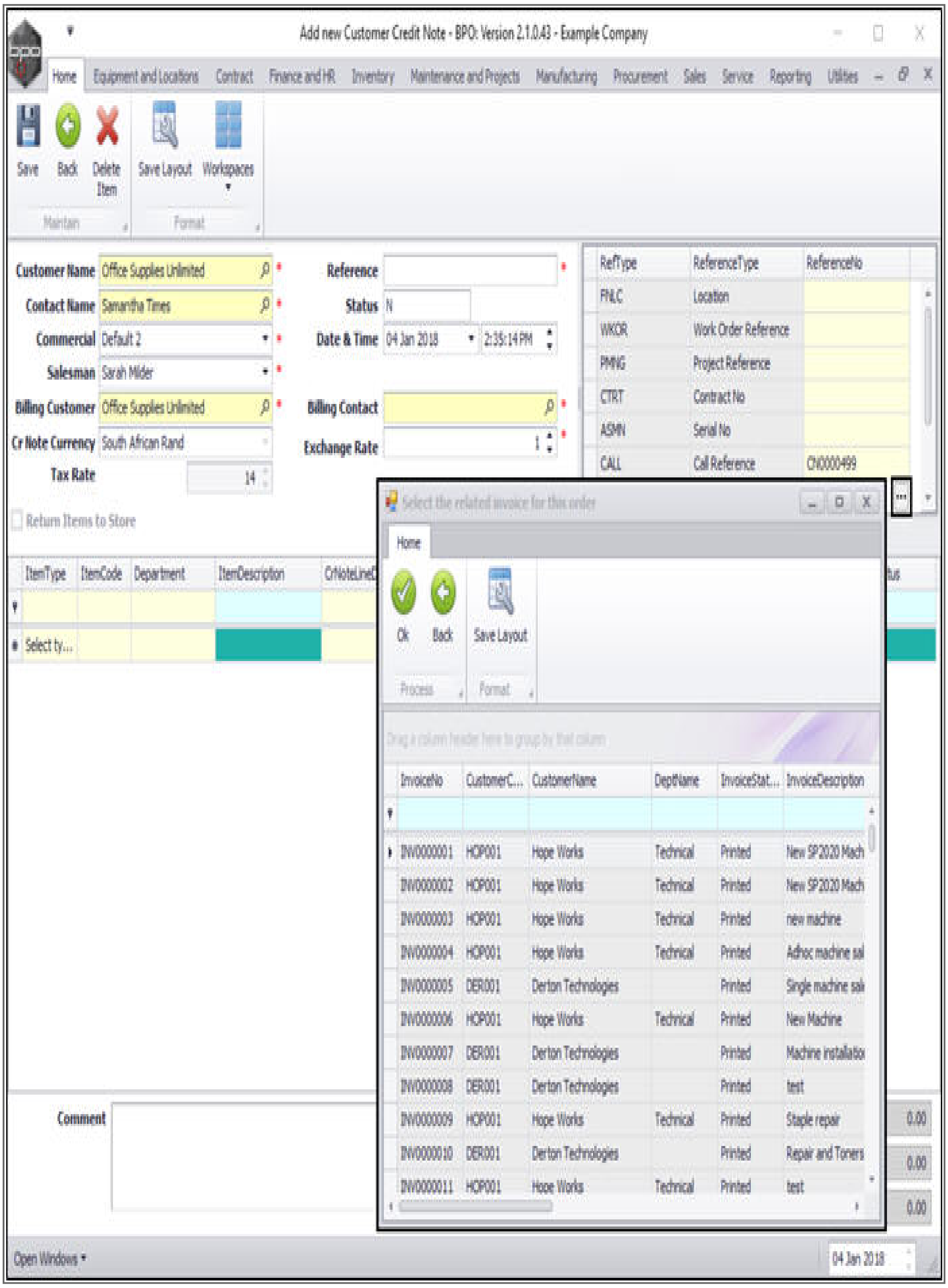
- The ***Add new Customer Credit Note*** screen will be displayed.
- Click on the ***Related References*** tab.



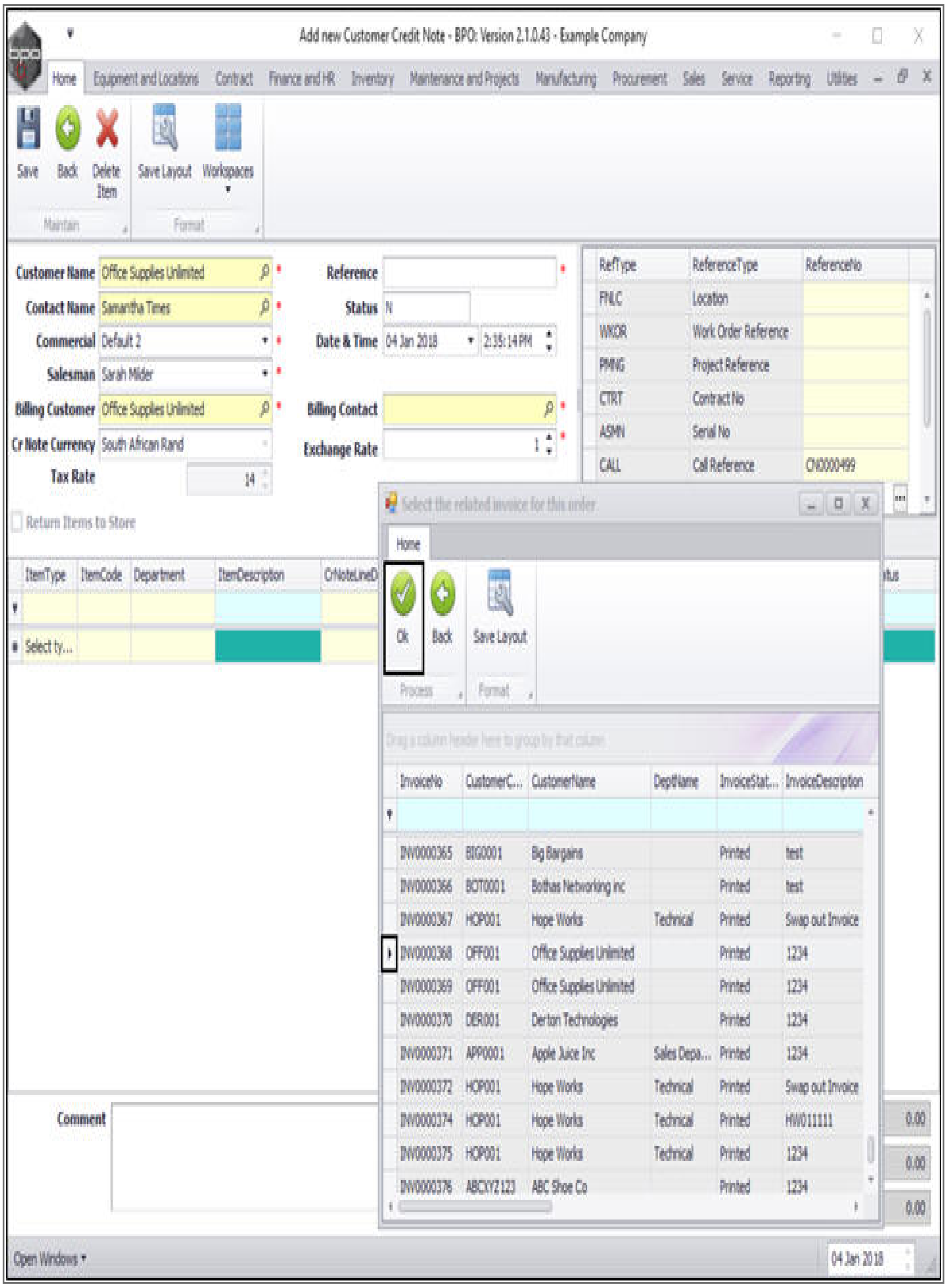
- The Related References panel will be ***expanded***.
- Click in the ***text box*** under the ***Reference No.*** column, in the ***Invoice No.*** row.



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



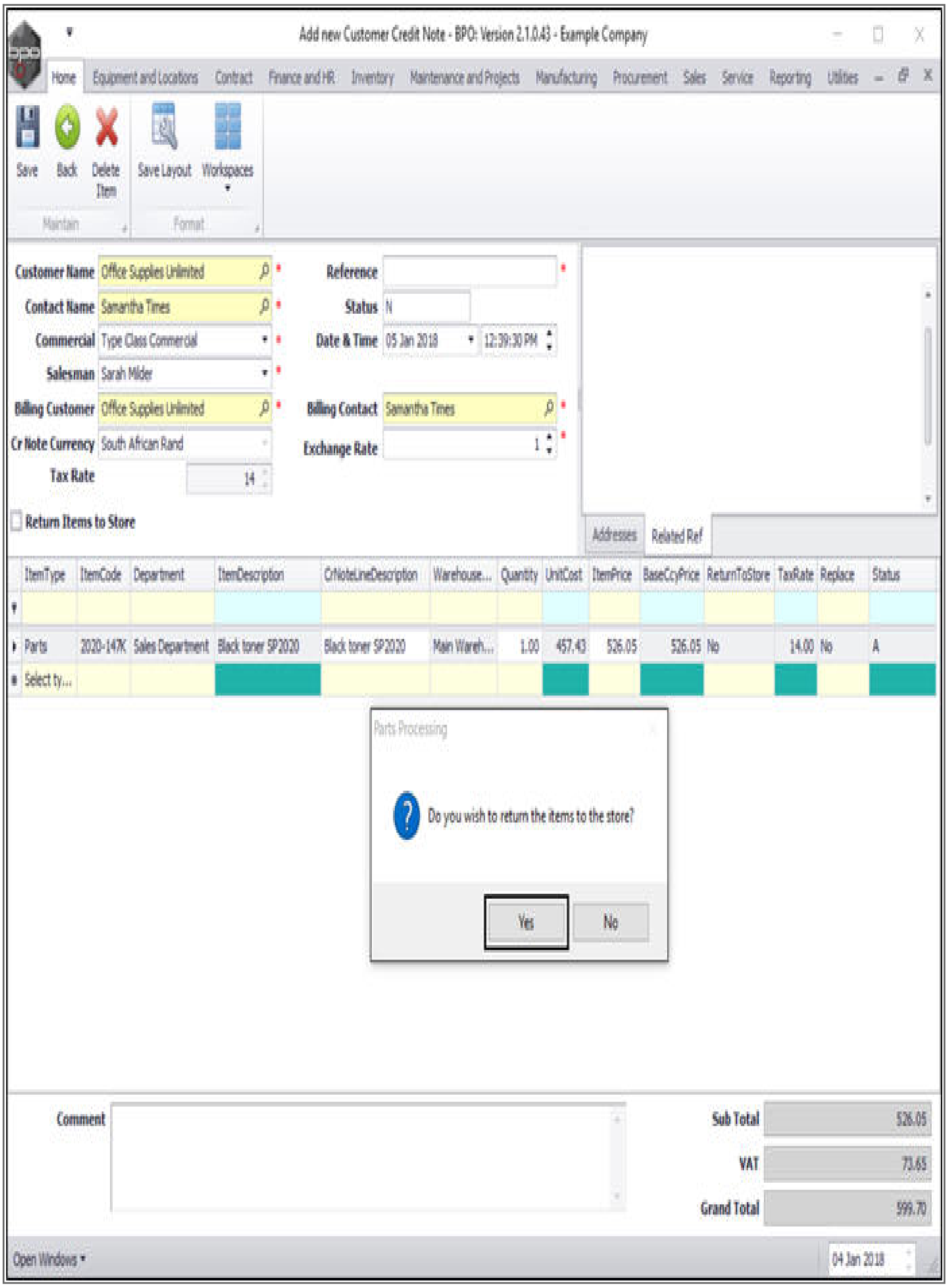
- Click on the ***row selector*** in front of the ***invoice*** that you wish to ***raise a credit note*** for.
- Click on ***Ok***.



- 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***.

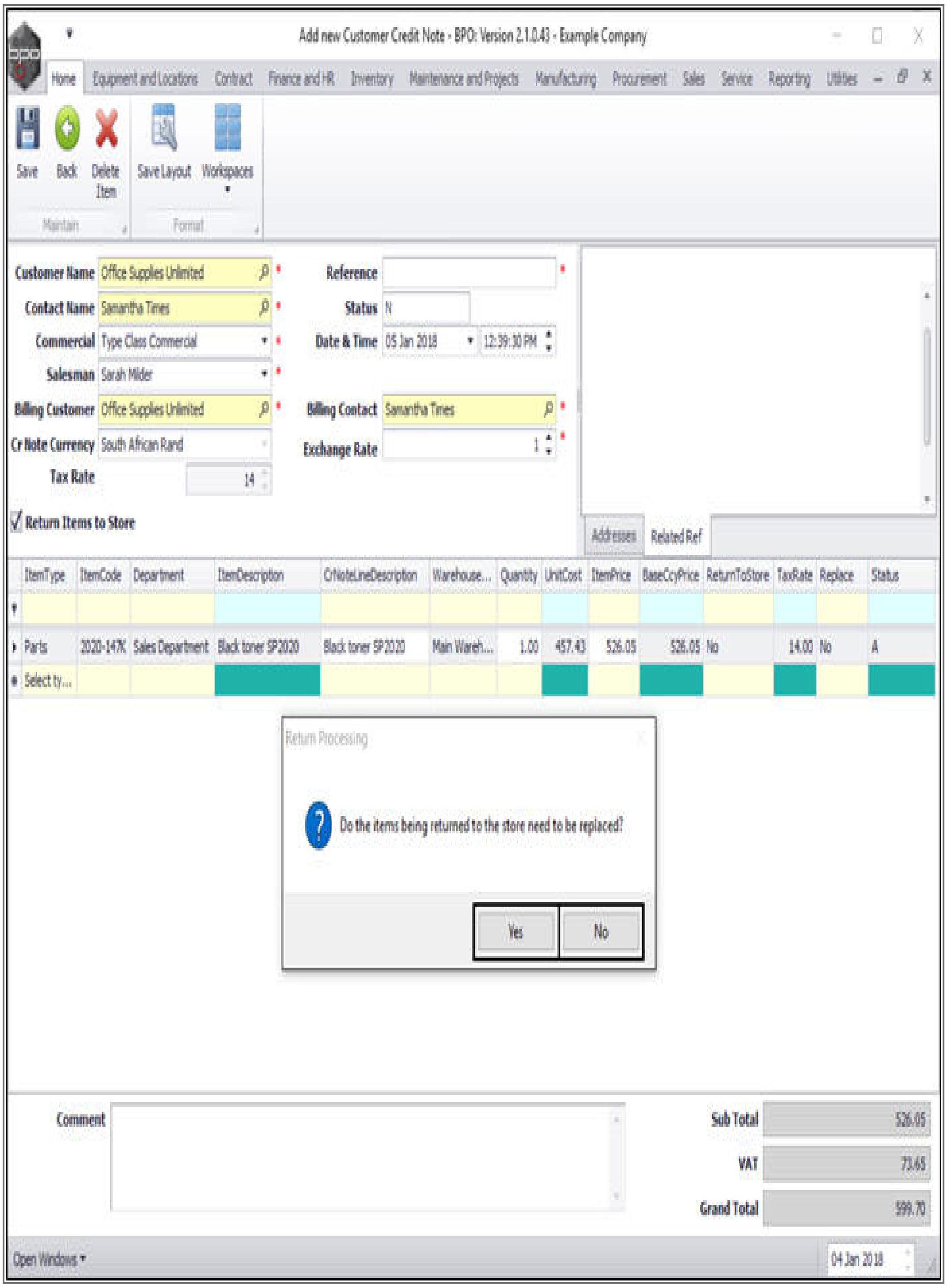
    - **Note:** Remember that you still need to return the stock using the Return Request screen, when the credit note is authorised and printed.



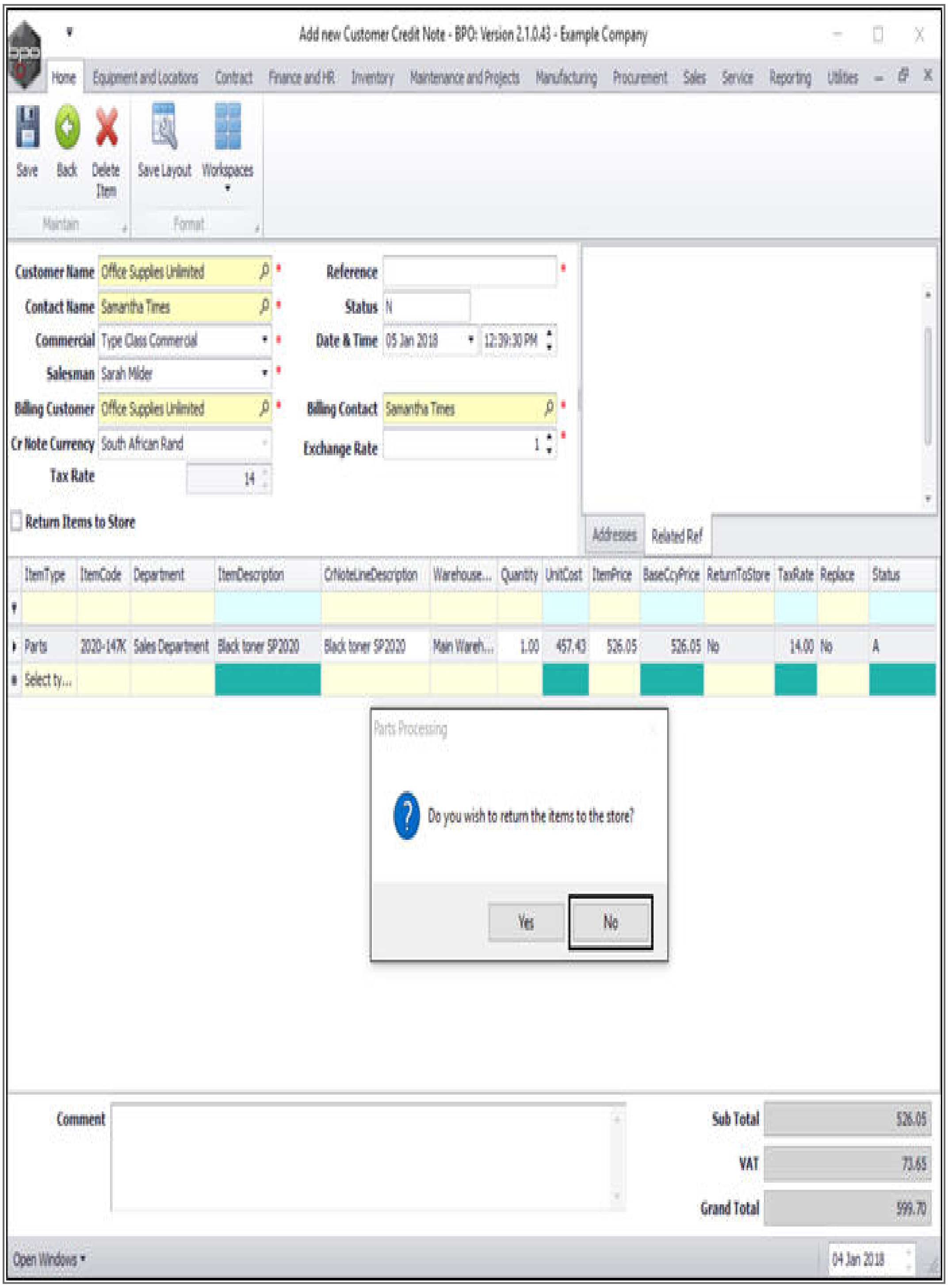
- If you have selected to ***Return the Item to Store***, then a ***Return Processing*** message box will pop up, asking:

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

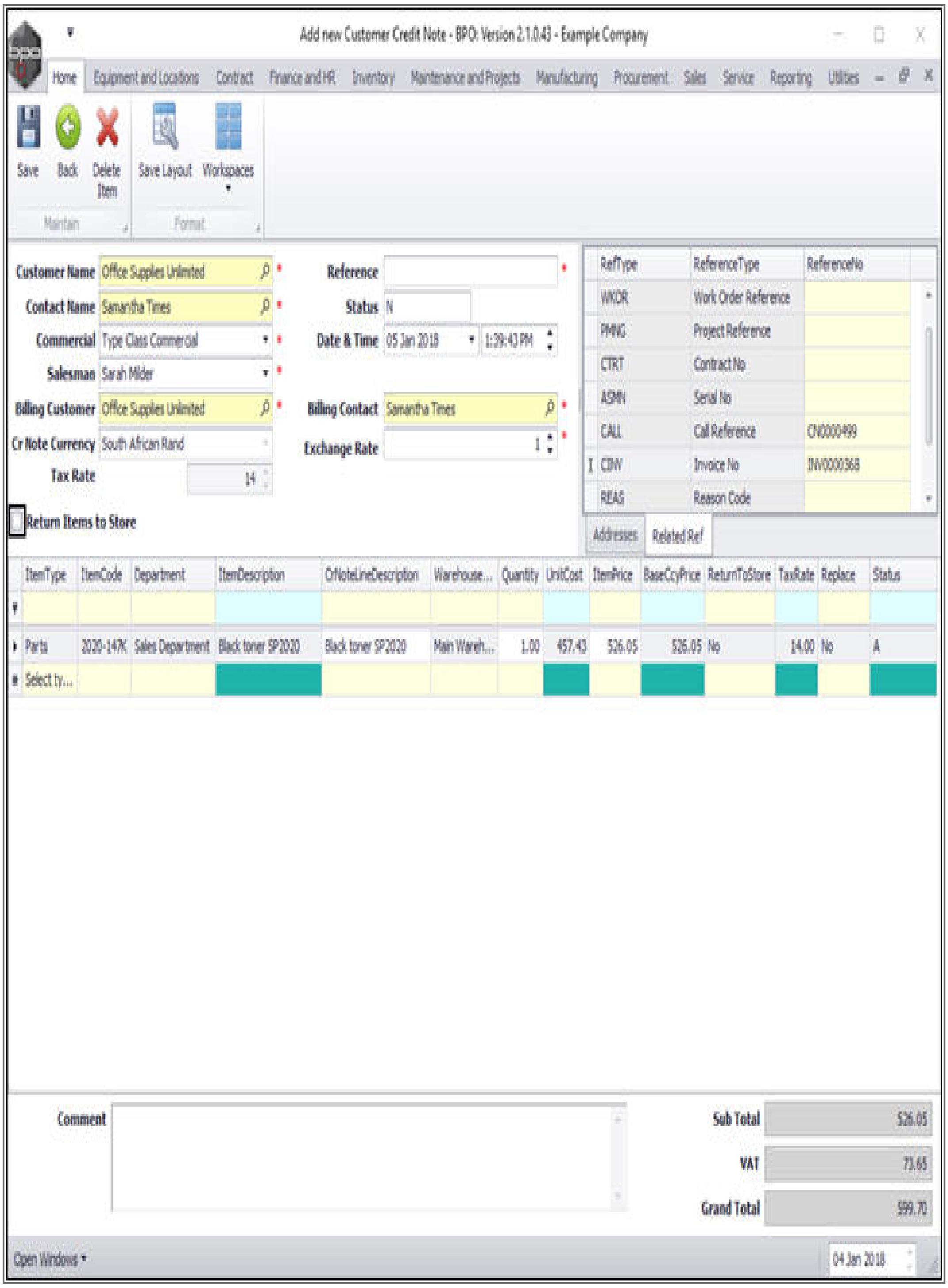
- Select **Yes** If the part issued was the correct part, but is damaged / or has the incorrect serial number, and a new part of the same part code needs to be issued.
  - **Note:** Once the part has been returned to store, the part request will **re-open** to be fulfilled - a new part / correct serial 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.



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

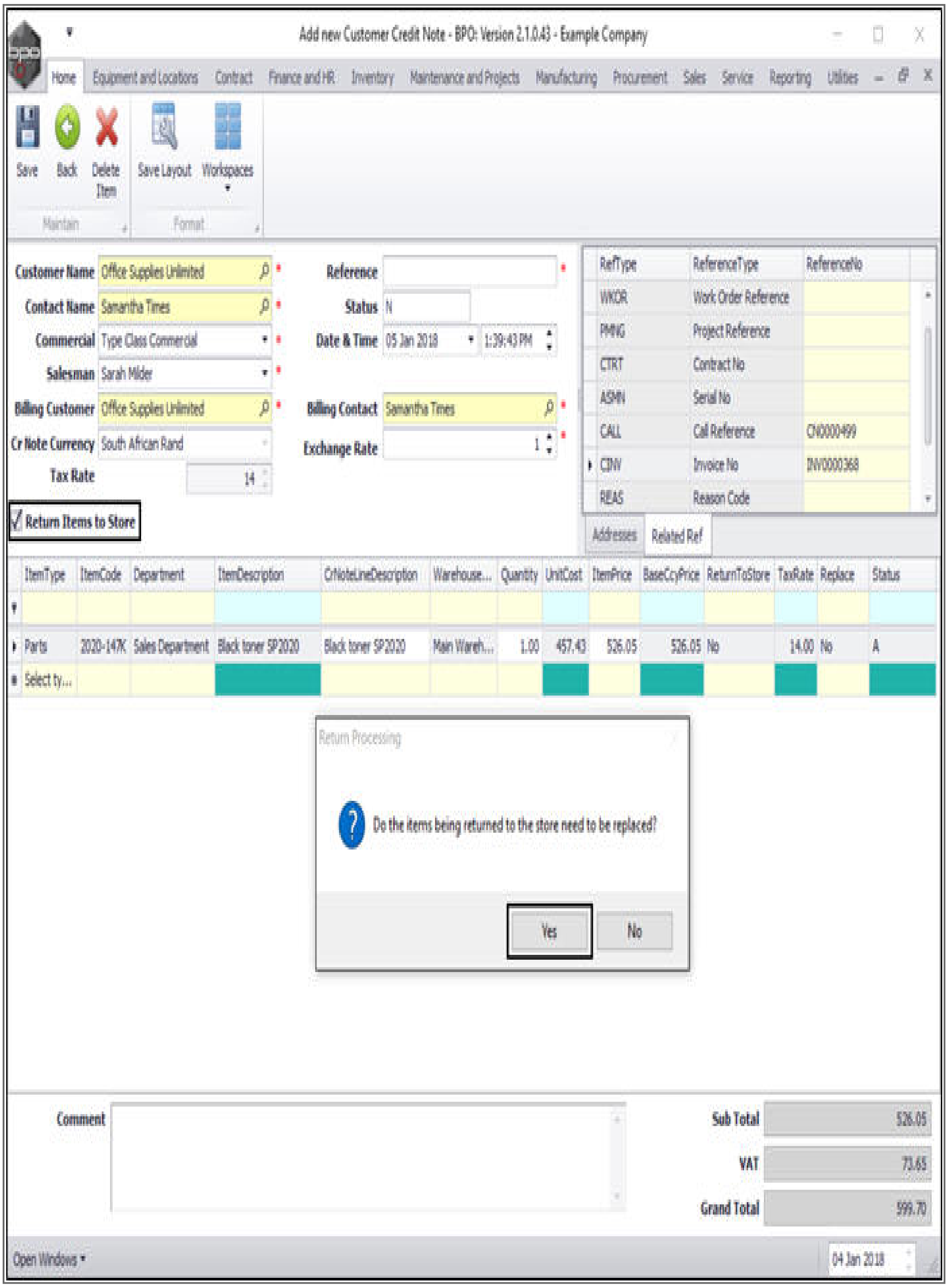


- You do have the option to use the ***Return Items to Store*** flag if you made the incorrect choice.

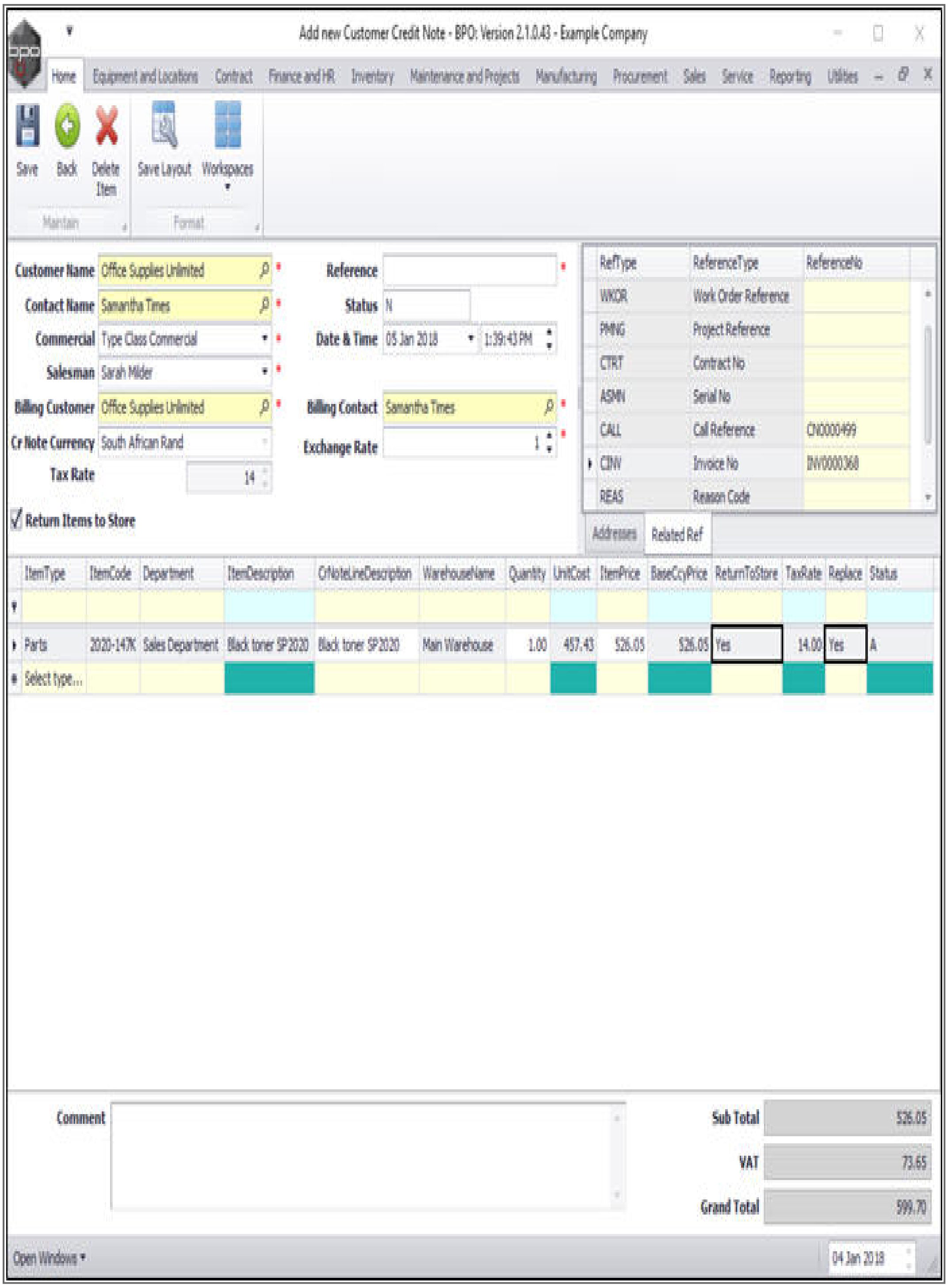


- When you click on the ***Return Items to Store*** check box, a ***Return Processing*** screen will pop up asking;

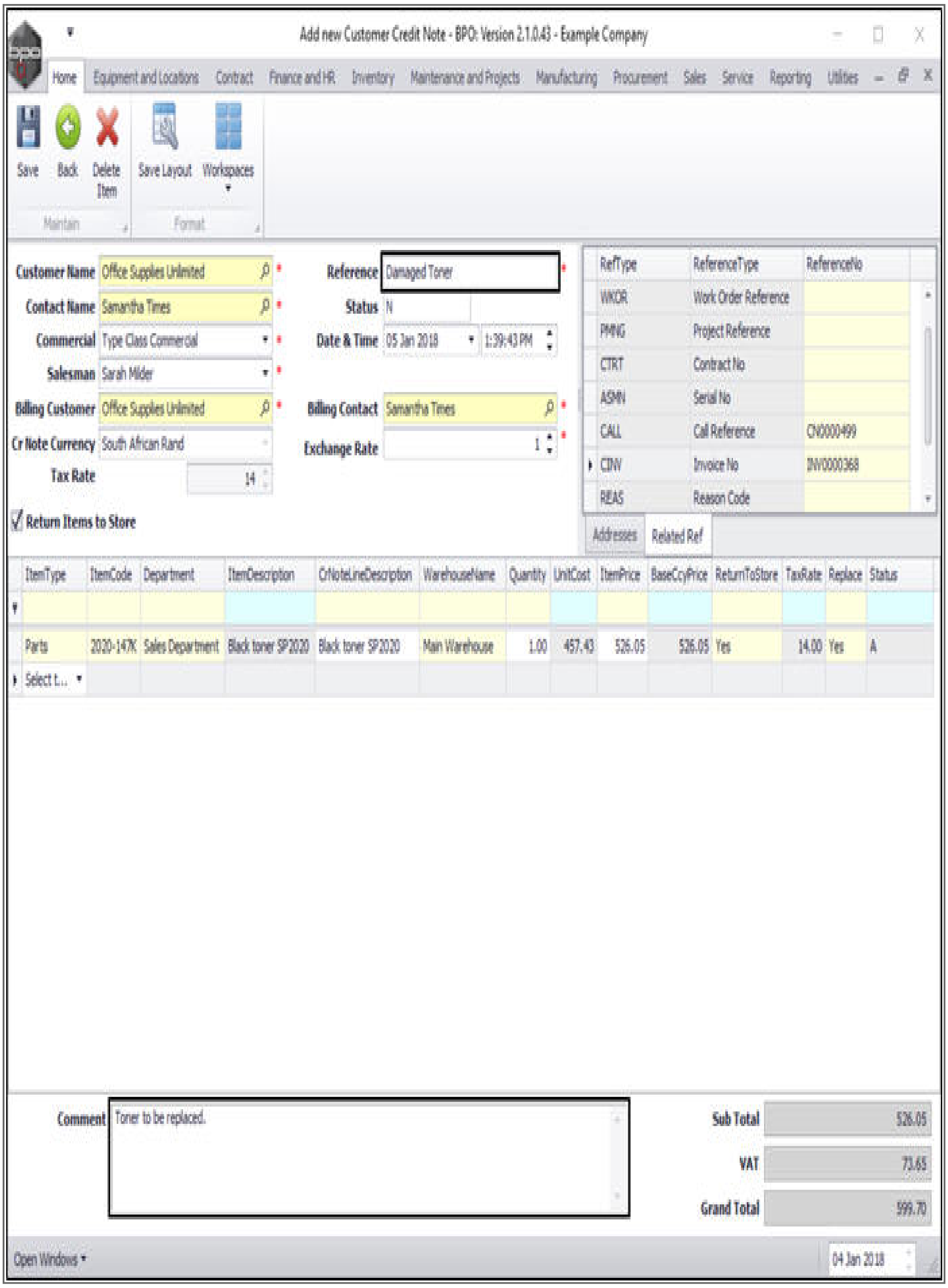
  - ***Do the items being returned to the store need to be replaced?***
- You now have the opportunity to correct your previous choice, if required, and click on ***Yes***.



- 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.

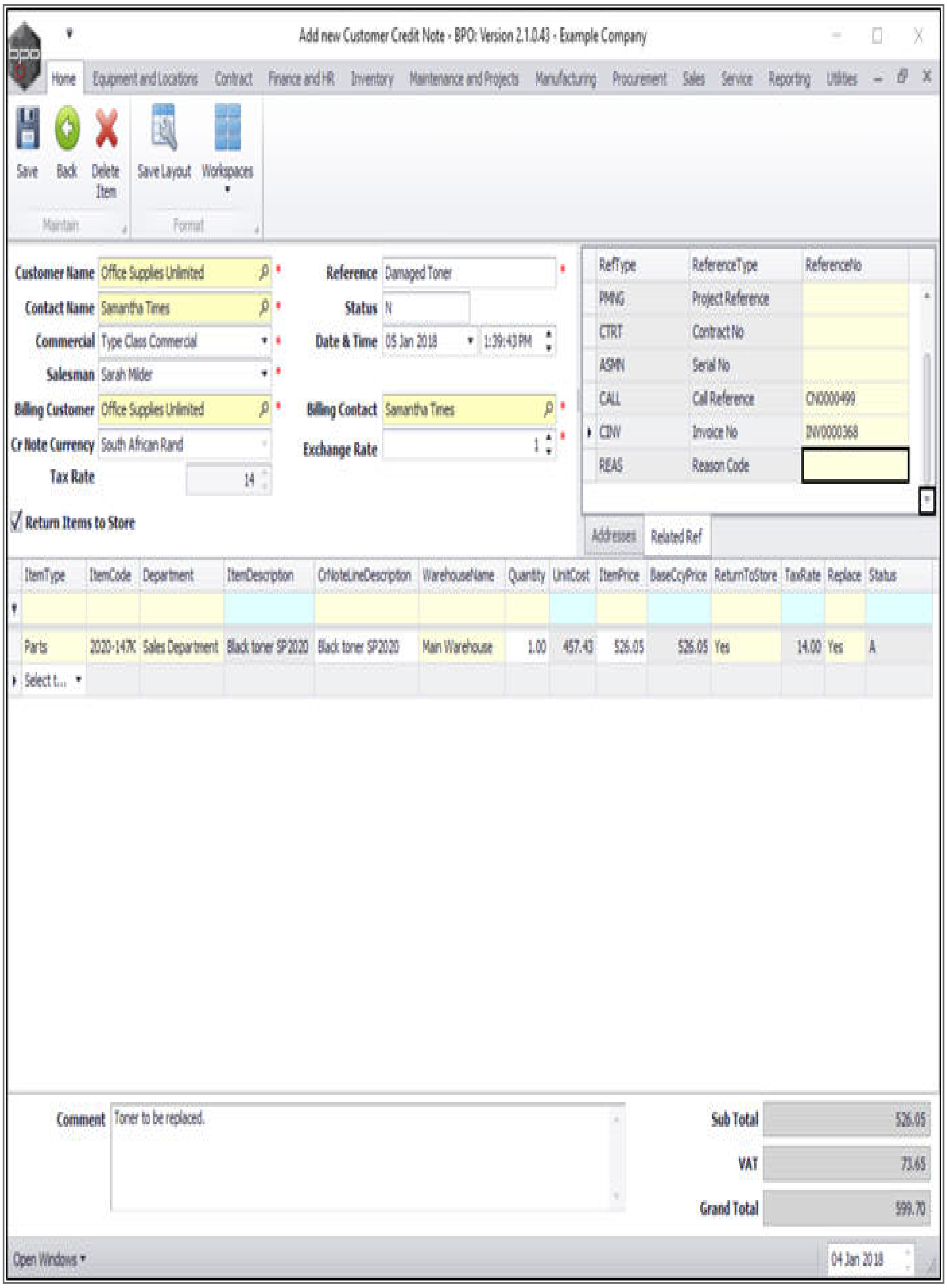


- Ensure you have a ***Reference*** and ***Comment*** relating to the ***reason*** for this credit note.

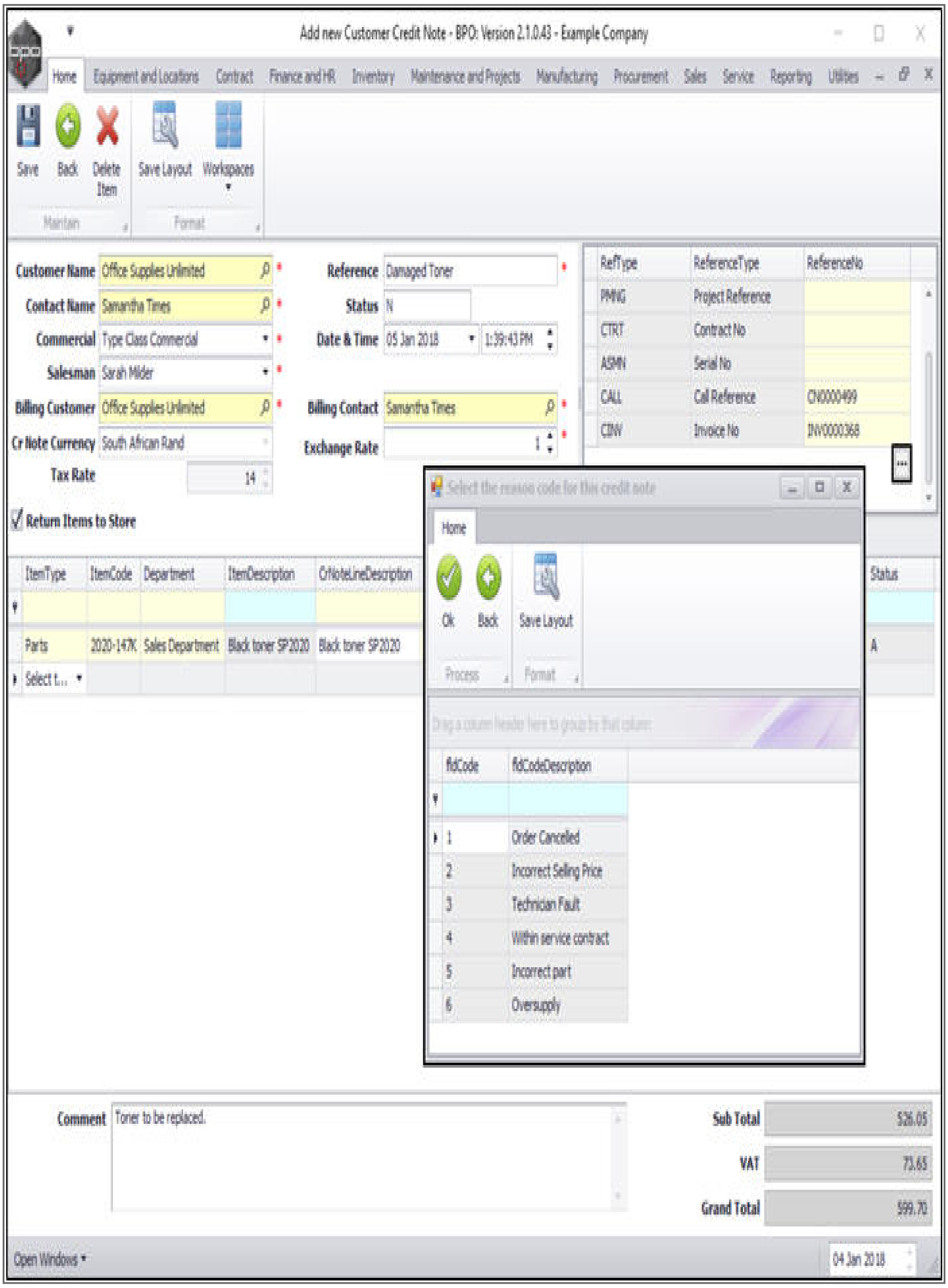


- In the ***Related References*** panel, ***scroll down*** until you can view the ***Reason Code*** row.

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

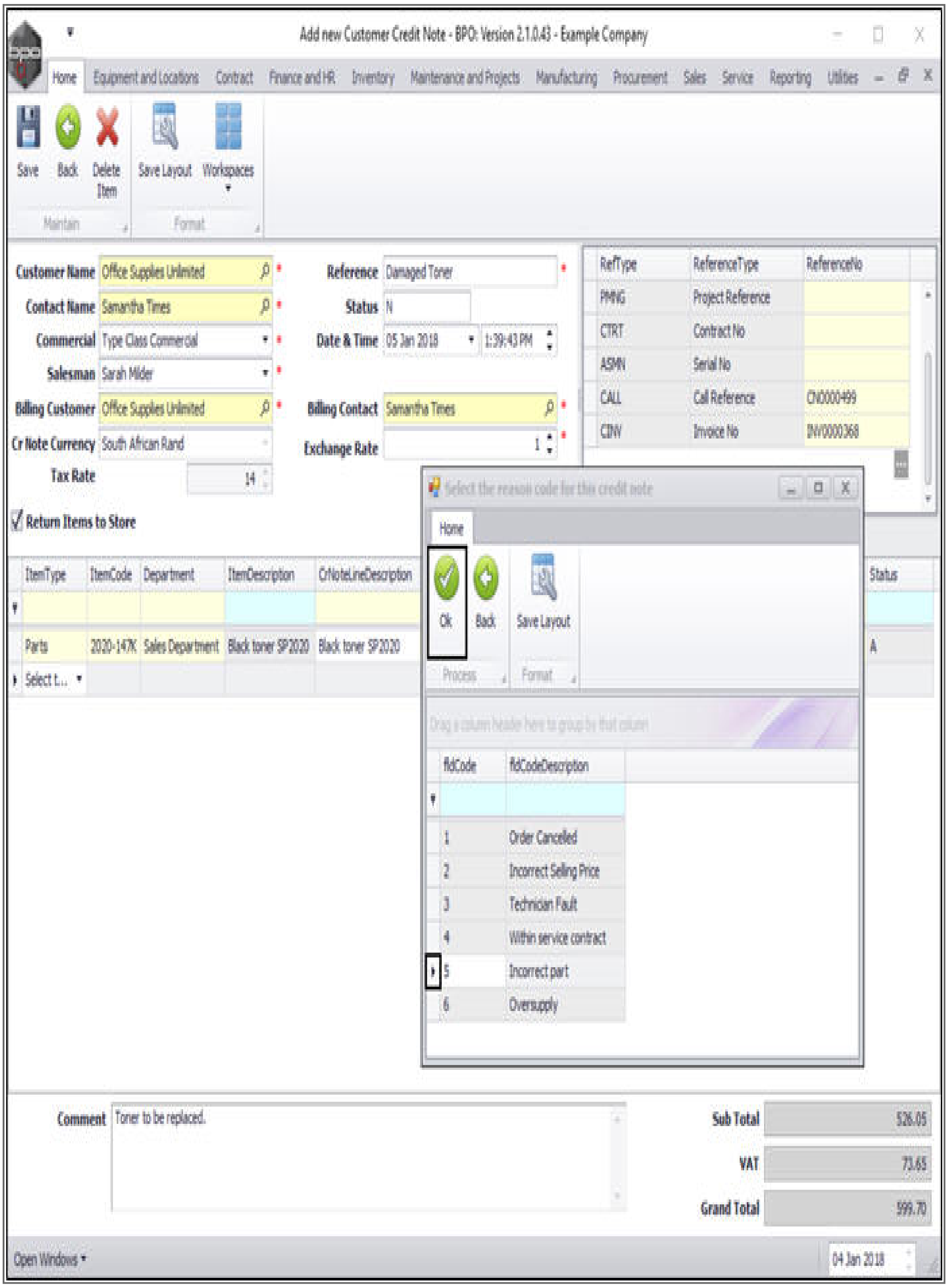


- An ***ellipsis [...]*** button will be revealed.
- Click on this ellipsis button to display a ***Select the reason code for this credit note*** pop up screen.

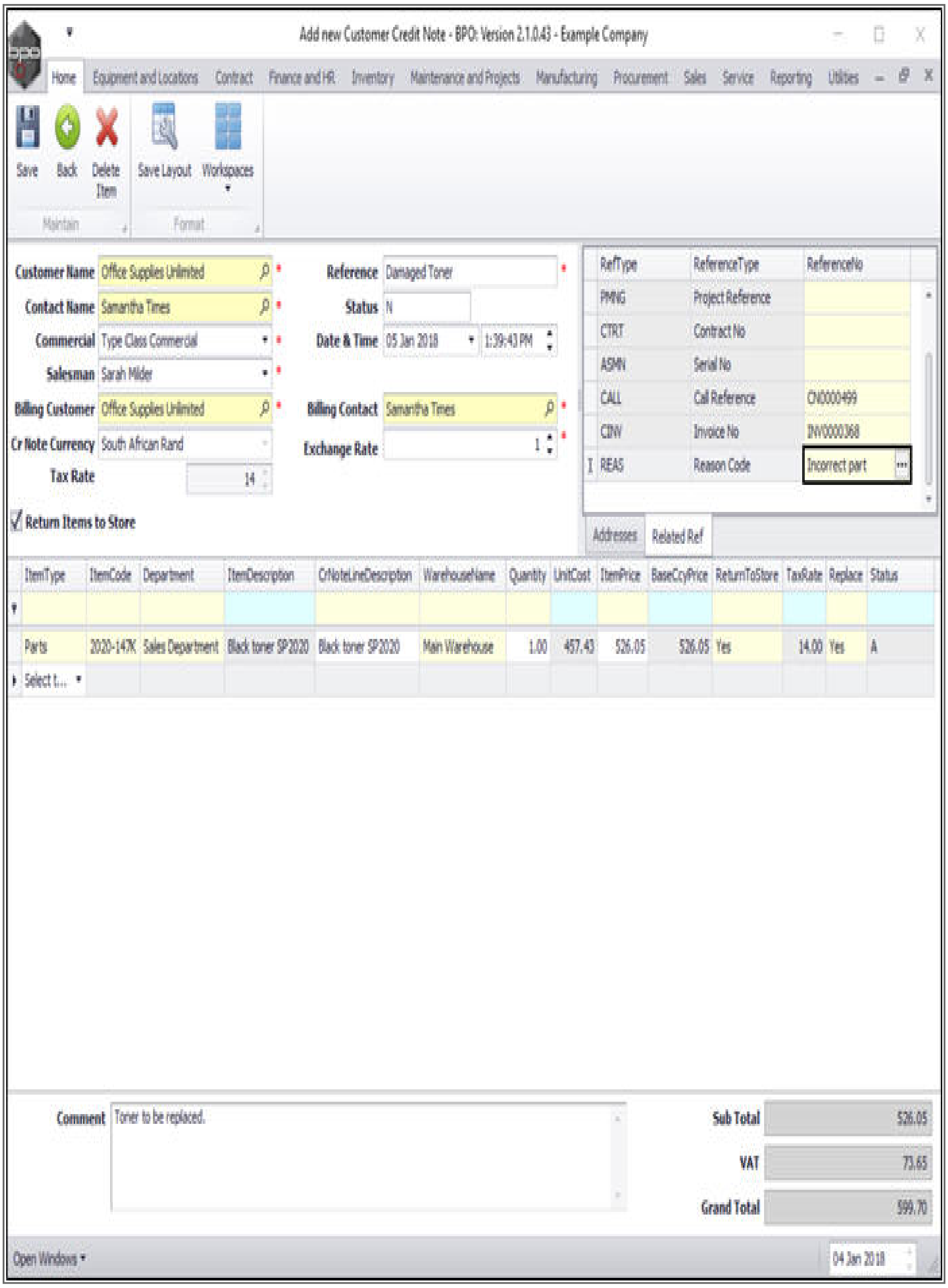


- Click on the ***row selector*** in front of the ***reason code*** that you wish to ***select*** for this ***credit note***.
- Click on ***Ok***.

  - **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: Credit Note Reason.



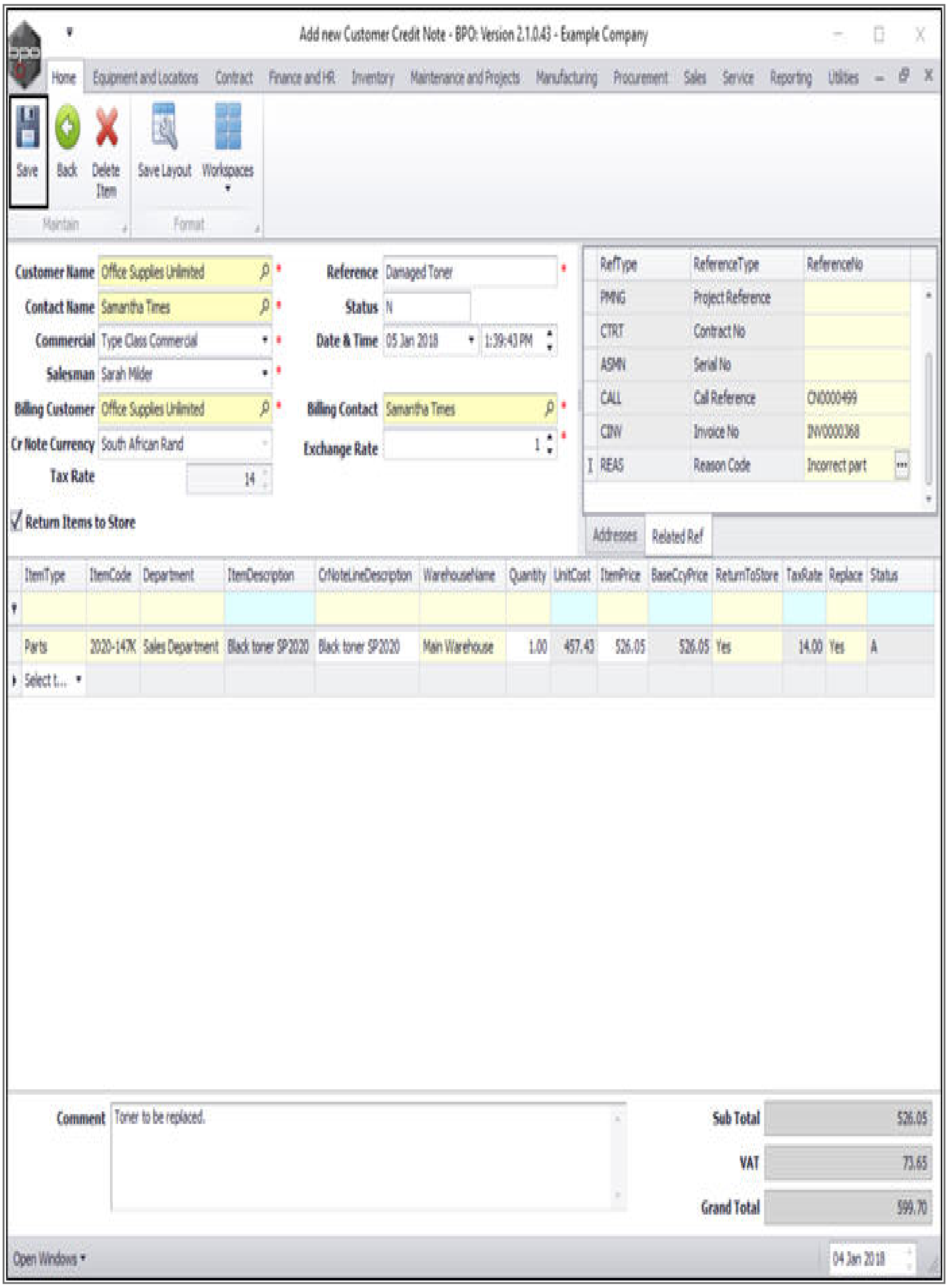
- The selected reason code will now populate the Related References panel.



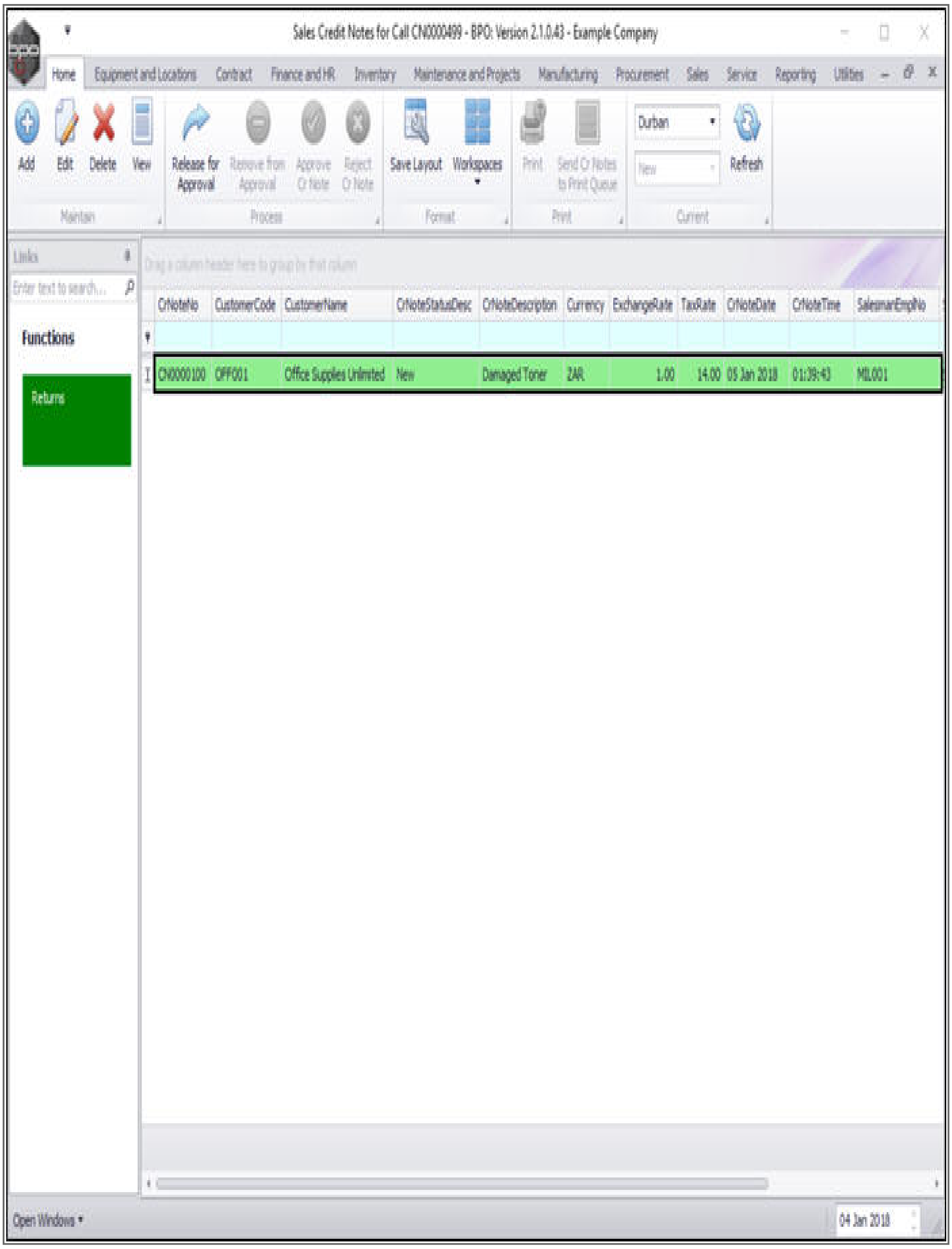
- If you leave the credit note **as is** and click on Save, it will be credited it **in full**.

- **Note:** You can also do a partial credit note.

- Click on ***Save***.



- 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)



Related Topics

[Edit Credit Note]

[Delete a Credit Note]

[Credit Note Approval Process]

[Return Stock to Store (if returning stock)]

MNU.122.024