

Credit Reason

To be able to select a credit reason on credit notes credit reasons applicable to your business needs to be created first

To add or edit a credit reason go to:

Debtors module> Configuration> Add. Debtor Properties> Credit Reason

Click the tab Credit Reason

The screenshot shows the 'Additional Debtor Properties' window. On the left, the 'Configuration' menu is open, and 'Add. Debtor Properties' is highlighted with a red box. In the main window, the 'Credit Reason' tab is selected and highlighted with a red box. The 'Code' field is empty, the 'Description' field is empty, and the 'Active' checkbox is checked. The 'Page 0 of 0' and 'Remove Paging' options are visible at the bottom.

Click Add to create a new Credit Reason

Enter a Code and Description

Click Save and close or,

Save and New to add another Credit reason

The screenshot shows the 'Debtor Property Maintenance' window. The 'Code' field is filled with 'FAULTY', the 'Description' field is filled with 'Faulty Item', and the 'Active' checkbox is checked. The window has buttons for 'Save And New', 'Save And Close', 'Save', and 'Close'.

Once all reasons have been setup, this will allow the user to select the applicable reason for the credit note when capturing a credit note.

Attachments Memo Create Reminder Change Warehouse Create Quote

Credit Note

Detail Address Link Shipping Extras Docs Custom Fields

Credit Note No.: **Preparation** Description: Wastage Item

Customer: SAS Reference:

Customer Name: Sound And Security's Order No.:

Sales Rep.: Gerrit Com **Credit Reason:** Faulty Item

Credit Note Date: 2024-09-02 Currency View: Cancellation of contracts

Due Date: 2024-10-02 30 Days From Invoice 1 Exchange Rate: Faulty Item

Customer Status: Commission Complete Comment: Incorrect Price

Stock Replacement

Save Close Print Doc Process T & Cs

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