FULL REFUNDS AND CREDIT NOTES

To issue a credit note against a specific sales order number (cash or account)

1. Click on Order Processing icon on front page
2. Click on New icon in grey header panel and select Convert to Credit
3. Select the appropriate reason from the drop down menu
4. Click on the reference number type that you wish to use (Customer/Invoice/Advice/**Sales Order**) and enter the appropriate reference from the customer's paperwork (if he has no paperwork, see below)
5. Click on Search icon at top right hand side
6. Select (highlight) the lines that you are issuing a credit note for by clicking on the stock numbers
7. Click on Paste icon at top right hand side
8. Click on Process icon in grey header panel of new window
9. Check that all details are correct in the pop-up and click on OK icon
10. Check that all details are correct in the next pop-up and click on OK icon
11. Would you like to print the Credit Advice now? Yes

If you do not have any original paperwork, you need to select Credit Note rather than Convert to Credit from the initial drop down menu

If the goods need collecting from a customer, contact Andrew.