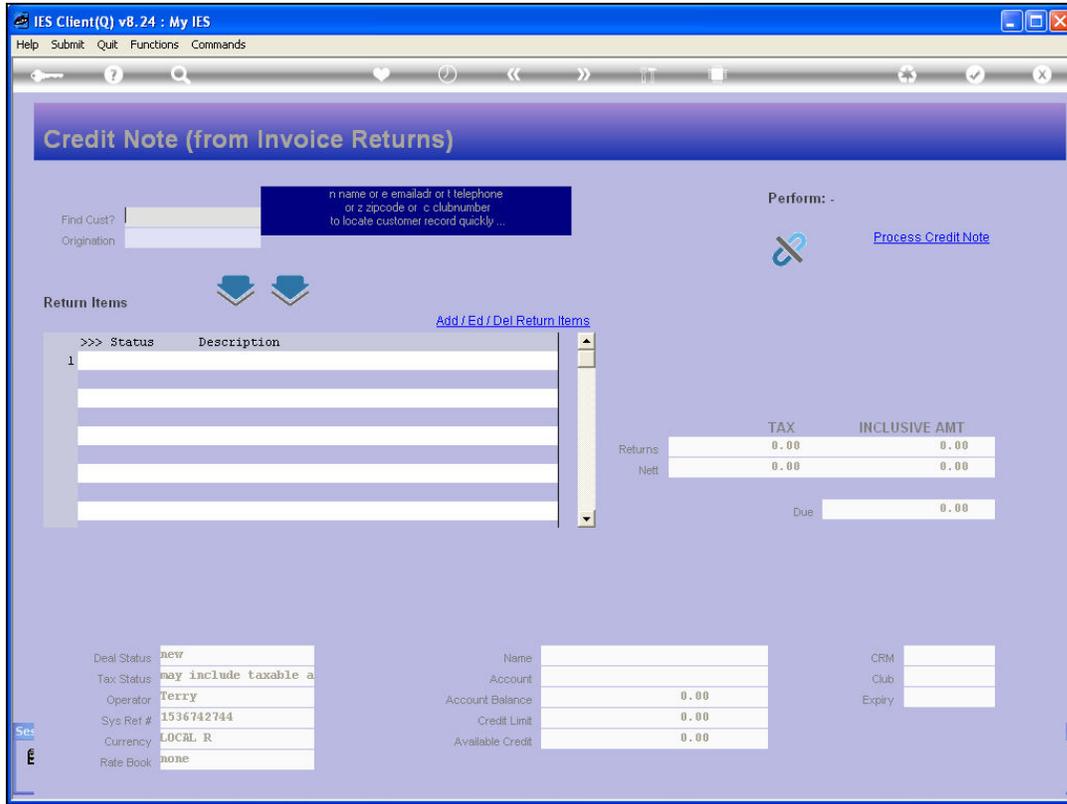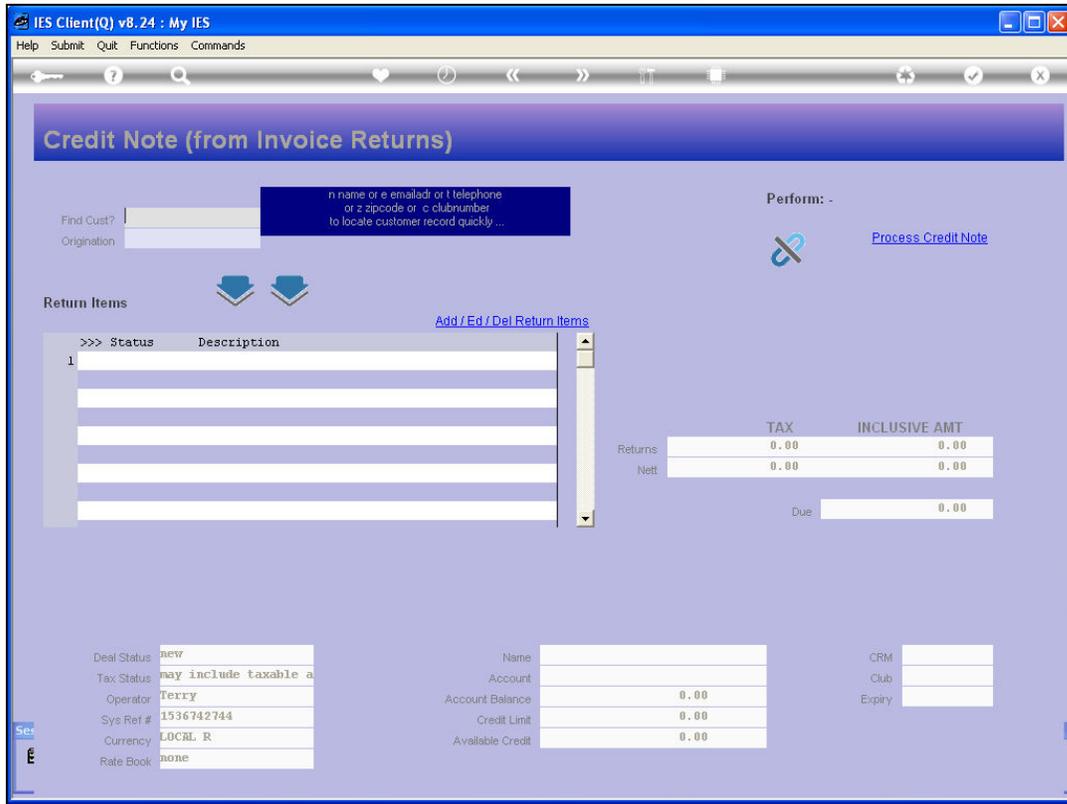Slide 1

Slide notes: In this tutorial we do an example of a Credit Note on the Indent Order type. From the section for 'Warehouse Indent Orders', we choose 'Credit Note'.
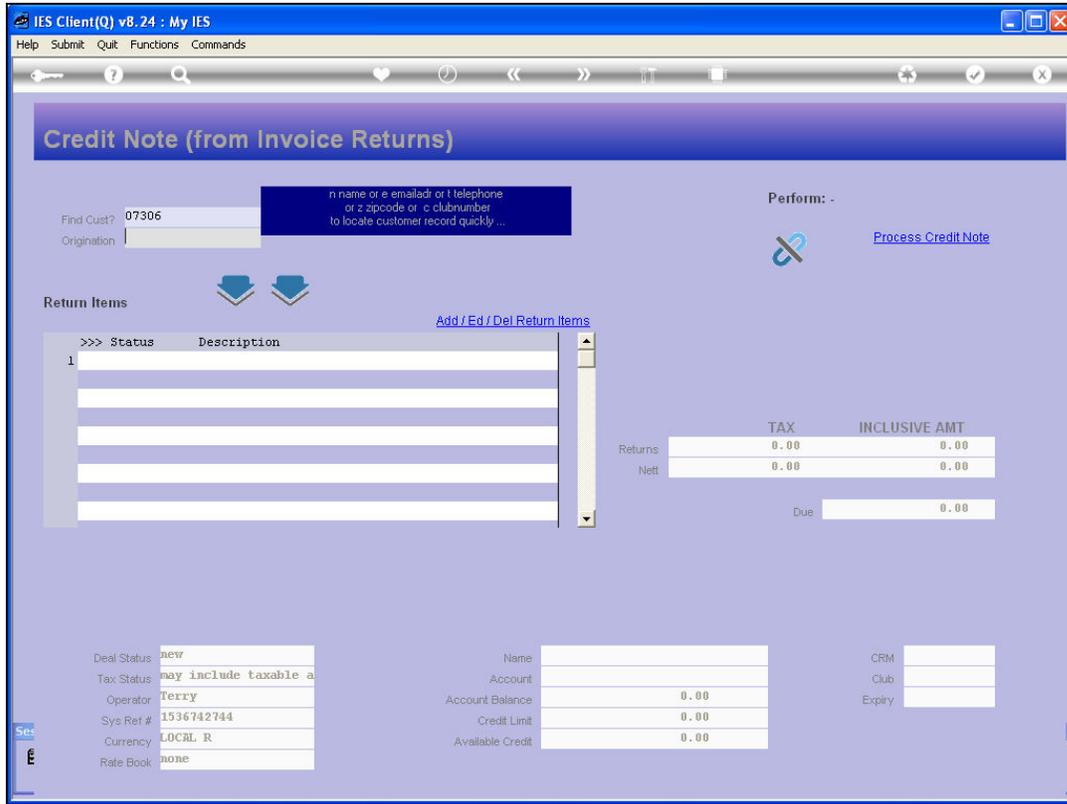
Slide 2

Slide notes: We start by retrieving the Customer Profile, using any of the many Retail methods to find the Customer Profile.
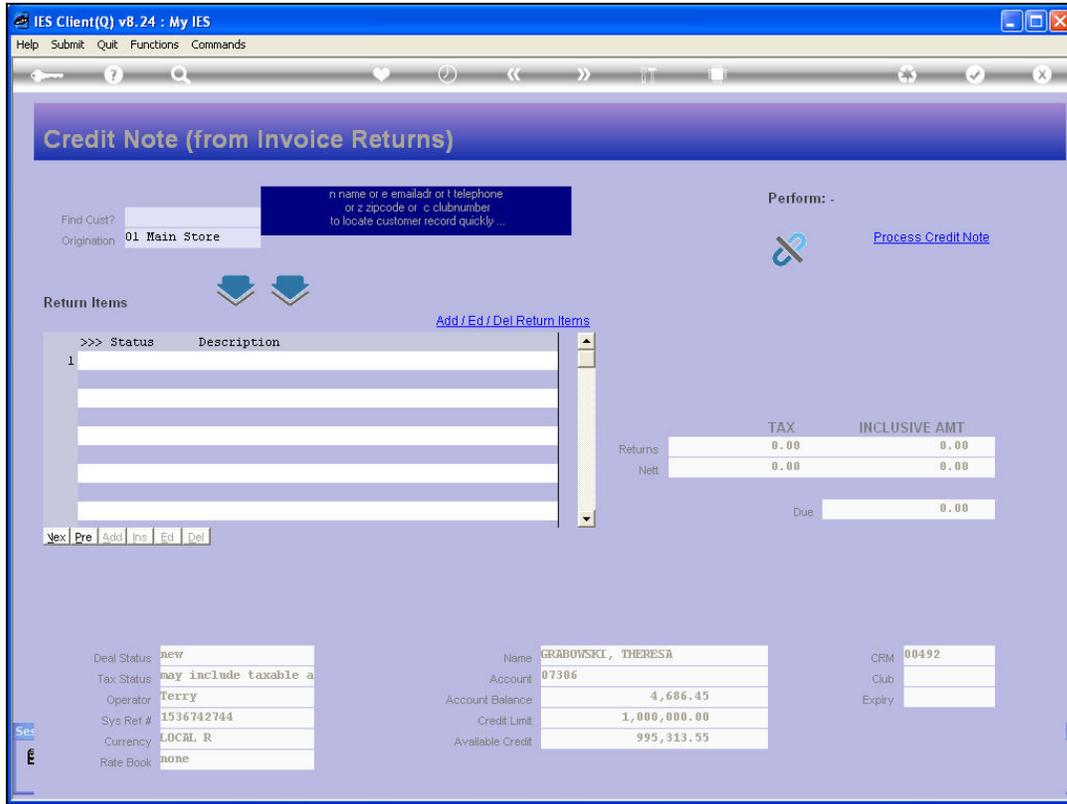
Slide 3

Slide notes: In this example, we are typing the Customer's Account Code.
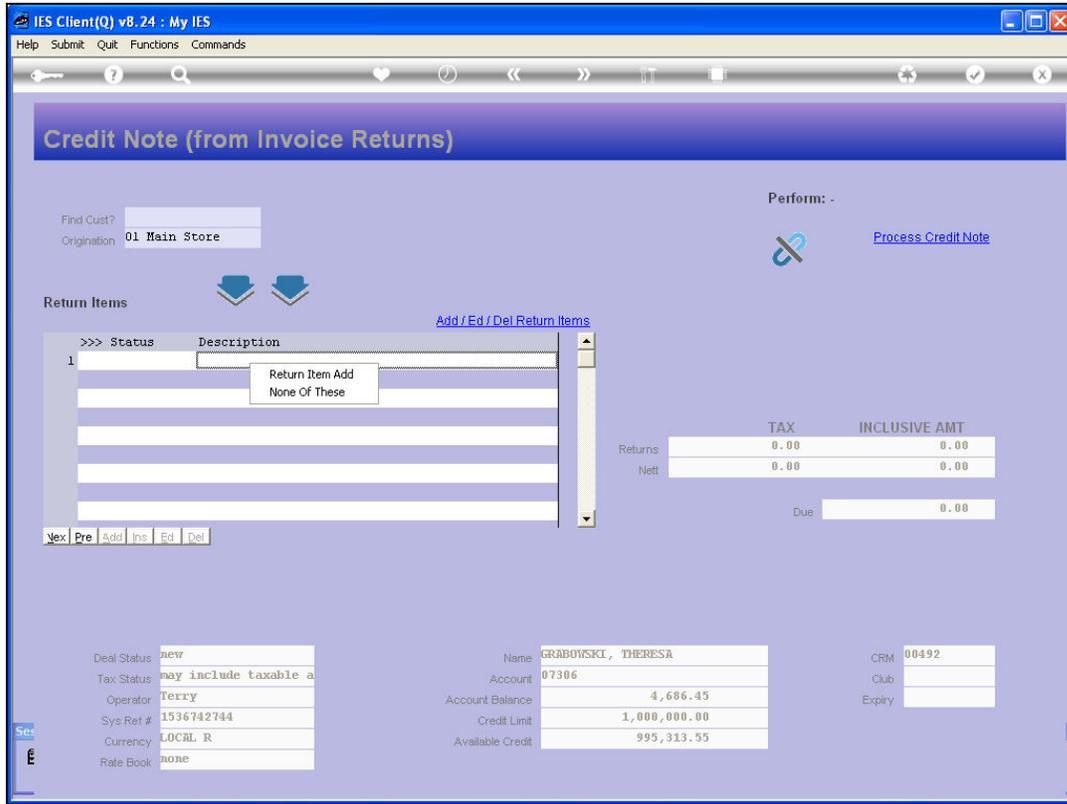
Slide 4

Slide notes: This brings up the Customer details, which are populated onto the screen. Then we select an Origination Code.
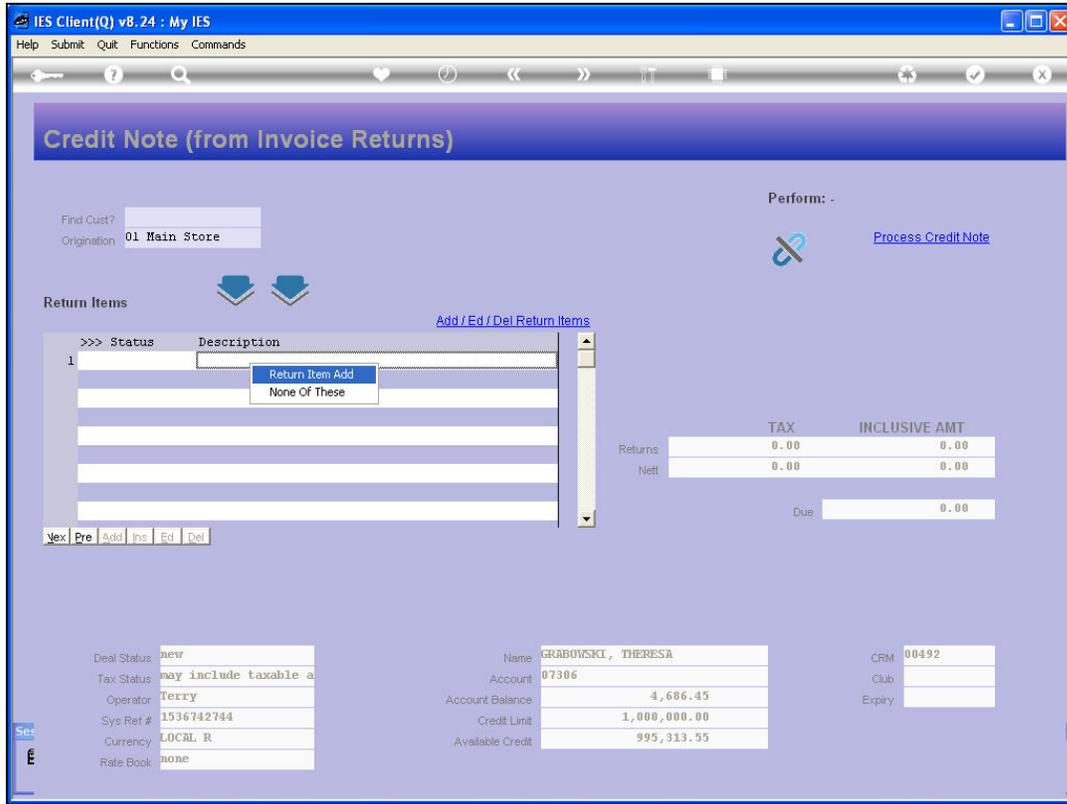
Slide 5

Slide notes: We double-click the Returns grid to add an item.

Slide 6
Slide notes:

Slide 7

Slide notes:

Slide 8

Slide notes: The Invoice field has a lookup from which we can easily select a prior Invoice for this Customer. A return Item is of course based on a prior Invoice.

Slide 9
Slide notes:

Slide 10
Slide notes:

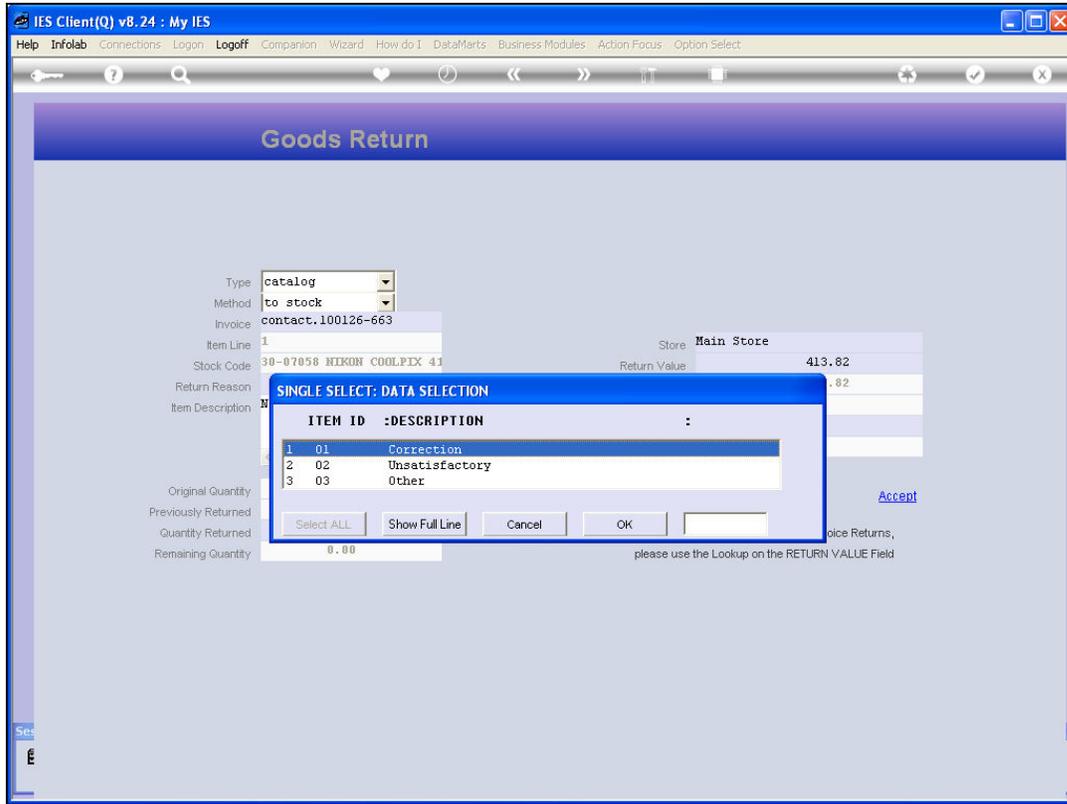Slide 11
Slide notes:

Slide 12
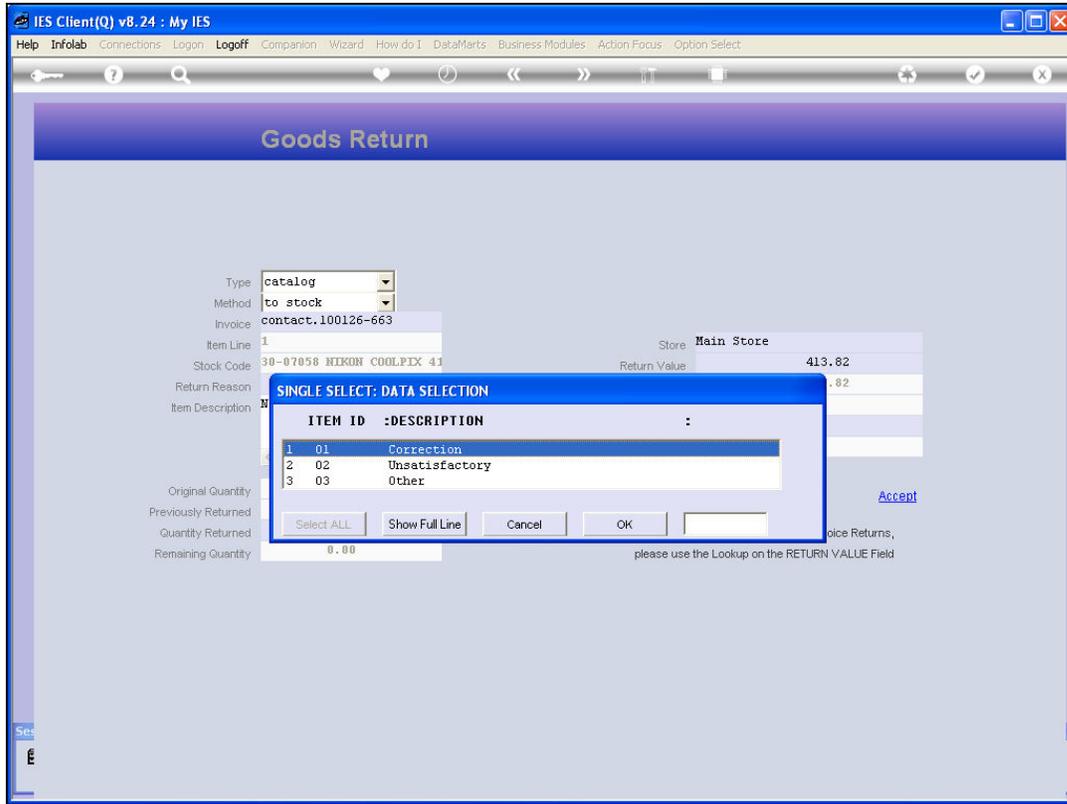Slide notes:

Slide 13

Slide notes:

Slide 14

Slide notes: The system will offer Items from the prior Invoice that can be returned, and we just select from that.

Slide 15

Slide notes: It is also necessary to select a reason for the return.

Slide 16
Slide notes:

Slide 17

Slide notes: From here, we could possibly adjust the return quantity or value, or simply select ACCEPT.

Slide 18
Slide notes:

Slide 19

Slide notes: The system now offers an opportunity to add another return item, but if we have no more we can just quit.

Slide 20
Slide notes:

Slide 21

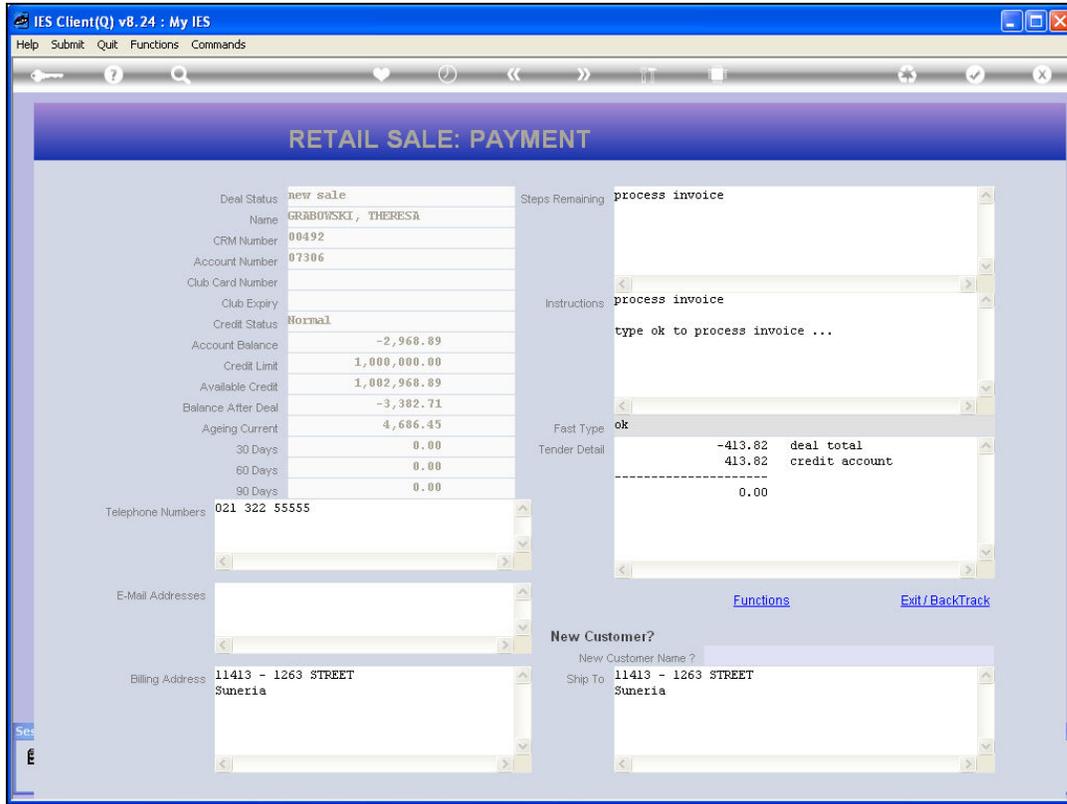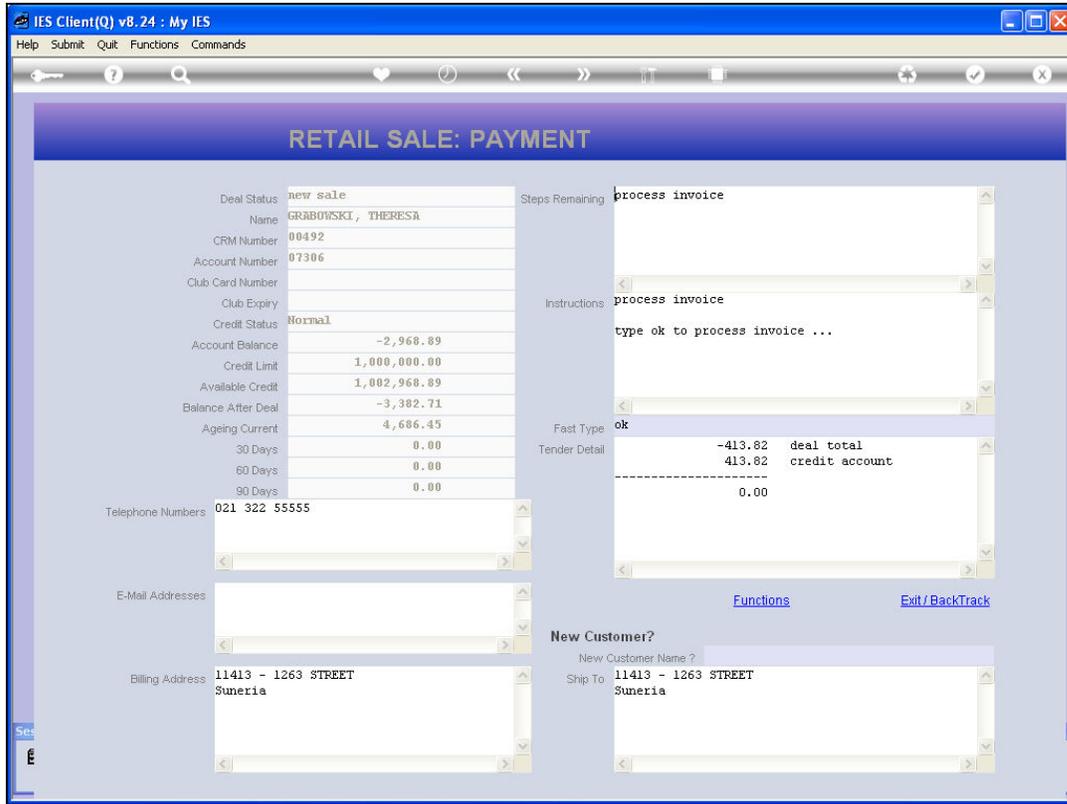Slide notes: Once we have all the return items listed, we just choose 'Process Credit Note'.
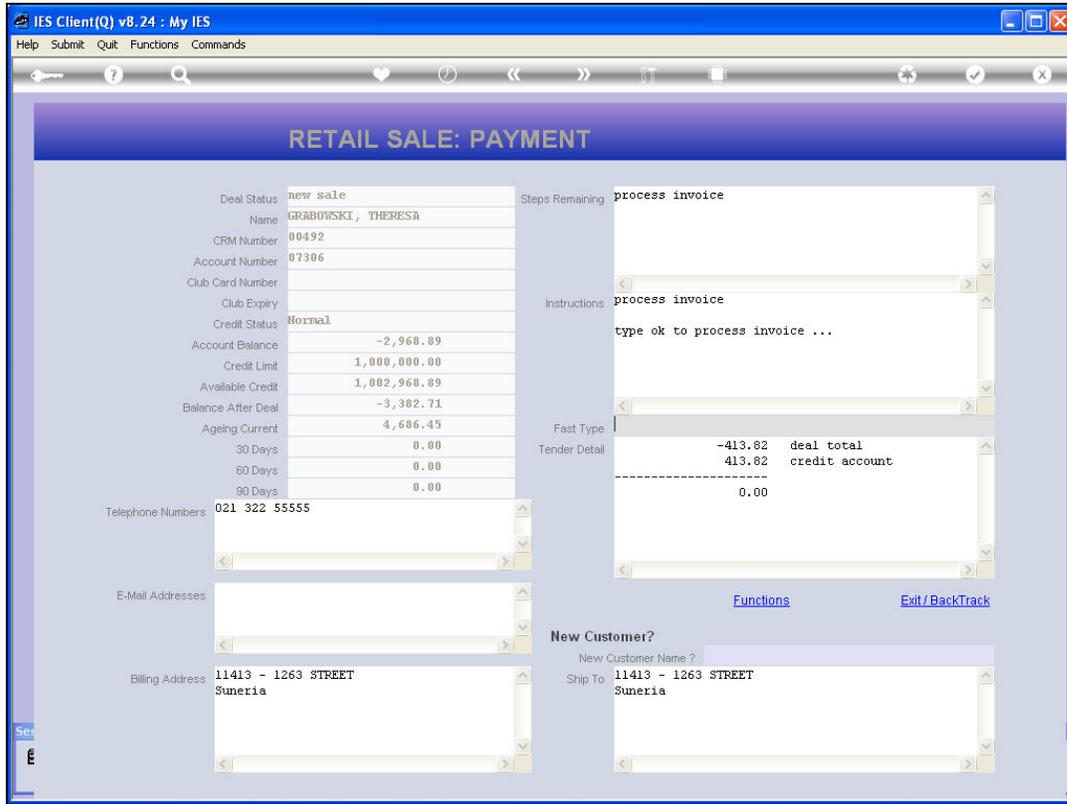
Slide 22

Slide notes:

Slide 23

Slide notes: The Tender page will default to an Account Credit and we can just accept.

Slide 24

Slide notes:

Slide 25
Slide notes:

Slide 26

Slide notes: And then the Credit Note Invoice is produced and the task is fully accomplished.