Credit Note Authorisation Facility

This feature is currently available on the **Palladium Enterprise 2011** version and higher.
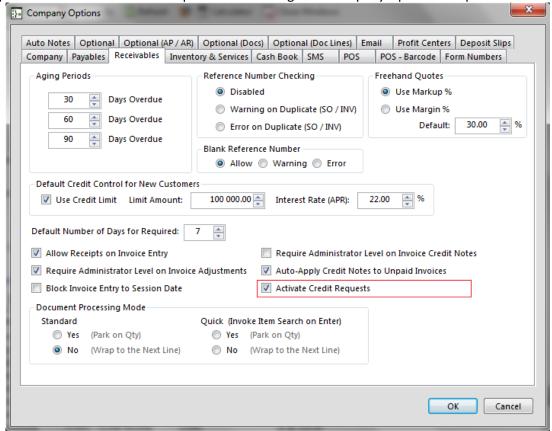

Feature Overview:

This feature allows you to Create a Request for Credit Document for items that have been or may have been returned for Credit. Businesses realise that passing a credit note is tantamount to giving someone cash and the additional security level is critical to managing returns.

How Does This Feature Help Your Business?

➢ It adds an additional security step for returns or a state where warranties and/or the condition of goods can be checked before credits are passed.

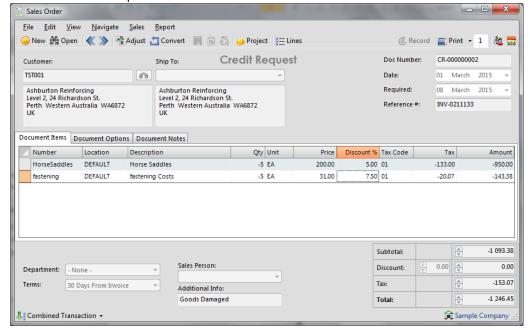➢ It offers additional security for management to assist in reducing theft and fraud in an organisation.

Feature Setup:

The ability to allow for Credit Return Requests is set through the Company Options Setup Function.

Feature Functionality:

To Create a Request for Credit all we need to do is to pass a Negative Quantity Sales Order. On saving the system will convert this to a "Request For Credit Document" as seen below.

Once the authenticity of the Credit Request has been established, all the manager needs to do is to Convert the document from the Sales Request and to Record/Update it accordingly.