

Credit Requests

With Purchasing open in your browser click on Task to expand the field and select Order History. The next screen will display your orders in the date range specified in your filters, found in the top right, for the locations that you have access to.

Invoice #	Vendor	Delivery	Delivery ...	Order Date	Receive Date	Amount(\$)	Status	Action
23	[REDACTED]	AM	1/7/2021	01-06-2021 11:36 AM	1/7/2021	\$278.28	Posted	Credit Request
200694989	[REDACTED]		1/5/2021	01-03-2021 12:00 AM	1/5/2021	\$3,076.90	Posted	
20	[REDACTED]	AM	1/5/2021	01-04-2021 03:02 PM	1/5/2021	\$266.22	Posted	
18	[REDACTED]	AM	1/4/2021	12-31-2020 04:15 PM	1/4/2021	\$262.62	Posted	
19	[REDACTED]	AM	1/3/2021	12-31-2020 02:47 PM	1/3/2021	\$294.24	Posted	
16	[REDACTED]	AM	1/2/2021	12-31-2020 02:45 PM	1/2/2021	\$300.72	Posted	

Click on Credit Request next to the date you wish to place a credit for. This will load the order information for you and list out what was ordered and a editable column next to it where you will fill out what you actually received. You can also fill in comments in the top right. When finished click Add Credit Request in the bottom left.

Category	Item	Unit	Ordered Qty	Received	Credit Qty	Price(\$)	Ext Price(\$)
Donuts	Apple Crumb	EA	12	12	0	\$0.2600	\$0.00
Donuts	Blueberry Cake Glazed	EA	18	18	0	\$0.2600	\$0.00
Donuts	Boston Kreme	EA	60	60	0	\$0.2800	\$0.00
Donuts	Choc Frost Sprinkles	EA	48	48	0	\$0.2800	\$0.00
Donuts	Chocolate Frosted	EA	48	48	0	\$0.2600	\$0.00
Donuts	Chocolate Glazed	EA	36	36	0	\$0.2600	\$0.00
Donuts	Dbf Choc Glazed	EA	24	24	0	\$0.3000	\$0.00
Donuts	Dunkfetti Donut	EA	36	36	0	\$0.3000	\$0.00
Donuts	French Cruller	EA	30	30	0	\$0.2600	\$0.00
Donuts	Glazed	EA	72	72	0	\$0.2600	\$0.00
Donuts	Kreme Filled	EA	24	24	0	\$0.2600	\$0.00
Donuts	Marble Frosted	EA	12	12	0	\$0.2600	\$0.00
Donuts	Old Fashioned	EA	30	30	0	\$0.2600	\$0.00
Donuts	Sour Kreme Powdered	EA	24	24	0	\$0.2600	\$0.00
Donuts	Straw Frosted Sprinkles	EA	48	48	0	\$0.2800	\$0.00
Donuts	Strawberry Frosted	EA	36	36	0	\$0.2600	\$0.00
Donuts	Sugar Jelly	EA	48	48	0	\$0.2600	\$0.00
Donuts	Toasted Coconut	EA	12	12	0	\$0.2600	\$0.00
Donuts	Van Frost Sprinkles	EA	24	24	0	\$0.2800	\$0.00
Donuts	Van Marble Frosted	EA	12	12	0	\$0.2600	\$0.00
Donuts	Vanilla Frosted	EA	24	24	0	\$0.2600	\$0.00
Donuts	Vanilla Kreme	EA	18	18	0	\$0.2600	\$0.00
Fancies	Coffee Roll	EA	9	9	0	\$0.4000	\$0.00
Fancies	Fritter	EA	6	6	0	\$0.4000	\$0.00

Comments

Enter comments...

Add Credit Request Cancel

To view any already placed Credit Requests and their status click on Credit Request under Task on the left side of the screen.

Purchasing

Q Search by Vendor, Invoice Number, Delivery, Status

Task ^

- Purchase Order
- Order History
- Credit Request**
- Invoice

Report v

Admin v

Drag a column header here to group by that column

Invoice #	Vendor	Delivery	Delivery ...	Order Date	Receive Date	Amount(\$)	Status
CR20	[REDACTED]	AM	1/5/2021	01-05-2021 11:22 PM	1/5/2021	\$4.68	Posted
CR17	[REDACTED]	AM	1/3/2021	01-04-2021 10:24 AM	1/3/2021	\$9.36	Posted