## Add Restocking Fee to Credit Adjustment Invoice.

## **Overview:**

This procedure explains how to add a Restocking fee to a Credit Adjustment Invoice for a Client.

**Click** on the 'Invoicing' tab in the OPTO Ribbon and select the Parameters icon (circled below). In the 'Parameters – Invoice' window, **click** in the "Surcharge" field and type RESTOCK and an amount. **Press** <F9> to save.

File	HOME CONTA	CTS RESOURCES INVENT	TORY QUOTES	PURCHASIN	IG ORDERS	JOBS/SCHEDULING	INVOICING	QUA
New	Clipboard	Create Invoice	View Invoice Batch Voice	nvoice To Do	<b>myob</b> Export-MYOB Expor	Export-XERO t s	Data Set 👻 Utilities 👻 Specials 👻	
	General Print (	Param Drder Conf Pro Forma Point of S	eters - Invoice					
	✓     [2] Popup - Selected Invoice No Order     Default Tax Code:     2       ✓     [2] C.O.D & Active & Account Code (Disabled)     Last Created Invoice No:     2063       [2] Despatch Date, Select Date     Image: Comparison of the select Date     The select Date							
	[2] No de ■ [3] Two F ✔ [2] Despa [2] Print e	f Export Name (Clients, Suppliers) ields, One Field, Description Only tch Amount greater then \$0 extra Part Description	This field percentag this examp set at 5%	e. For ple it is of the	Order Type	No Stock		
	[2] Print extra Material Description     [2] Use Cust Part Code for Invoice     Add Surcharge and Delivery to Invoice     [2] Use Multiple Companys							
	Surcharge:	RESTOCK	5.00	[2] Use Wareh	ouse			

The Credit Adjustment will have already been created, despatched and invoices. Open the invoice via 'Edit Invoice' and click on the *Surcharge* button.

	Invoice	
Invoice No: Client Code: 2063 BEAVER Details More Info	<b>₽</b> ■	Invoice Printed/Emailed
Invoice Date: Client Order No: 14/10/2014 PO: BM002323 Date Created: ABN:	Shipping Address: Badger Mining Pty Ltd	
14/10/2014       99 225         Claim       Notes         1       50065/1         2       50065/1         3       50065/1         4       4 50065/1         4       5         5       50065/1         6       50065/1         7       7         7       50065/1         FREIGHT	Continue? To add Surcharge to this invoice, this record must be closed. It will be re-opened upon completion of this operation. You may be prompted to save changes. If you do not save changes, any changes made to the record will be lost. Do you wish to continue? <u>Yes</u> <u>No</u> FREIGHT CODE	QLD         4824           nit Price         Disc         Total Price         Tax           320.0000         10.00         17280.00         6           30.500         .00         30.50         6           4.0000         .00         240.00         6           57.8000         .00         115.60         6           95.5000         .00         382.00         6           160.0000         5.00         4560.00         6           97.0000         .00         97.00         1
Surcharge	iscount Total (Ex) \$22,705.10 Tax \$2,27	70.51 Total (Inc) \$24,975.61

A message appears and the USER will be prompted to save the invoice, **click** on **Yes**. The Surge window opens – OPTO has worked out the 5% Restocking fee and displays the amount at the top of the message. Enter the calculated amount or another amount and **click** <u>OK</u>.

Surage Amount is %1,135.26					
Please enter the Surcharge Amount (in dollars) for this Invoice.					
1135.26					
<u>Q</u> K <u>C</u> ancel					

**Press** <F9> to save the Invoice.

	Invoice				
Invoice No: Client Code: 2063  Client Code: BEAVER Details More Info				🗌 In	voice Printed/Emailed
Invoice Date:         Client Order No:           14/10/2014         PO: BM002323           Date Created:         ABN:           14/10/2014         99 229 339 944           Claim         Notes         Size         Cost	Int No: Division: 1 : Acc Rev	Shipping Address: Badger Mining Pty Ltd 12 Old Quarry Road CLONCURRY			QLD 4824
No         Desp         Part Code           1         1         50065/1         ZXYW100           2         2         50065/1         VXYZ200           3         3         50065/1         OPTO01           4         4         50065/1         AB02001111           5         5         50065/1         OPTO171111           6         6         50065/1         REXTOR           7         7         50065/1         RESTOCK	Acc Rev CLONCURRY Description Part 1 INV NSTK One Sub-Part & WC1 Part 2 INV NSTK One Sub-Part & WC1 Material 2 INV NSTK use and buy each Material 3 INV STK used by meter buy in Lengths Heavy Duty Rim 17inch Part 3 INV STK One Material & WC1 FREIGHT CODE RESTOCK		Qty 60 1 60 2 4 30 1 1	Unit Price         D           320.0000         1           30.5000         4.0000           4.0000         57.8000           95.5000         160.0000           97.0000         1135.2600	Disc         Total Price         Tax           10.00         17280.00         6           .00         30.50         6           .00         240.00         6           .00         115.60         6           .00         382.00         6           5.00         4560.00         6           .00         97.00         1           .00         1135.26         1
\$ Surcharge 🚛 Delivery 💽 Discount	Total (Ex) \$23,	,840.36 Tax	\$2,384.0	4 Total (In	sc) \$26,224.40