# Service credit process

## Policy reference

**Please refer to GR119 – Delegated Authorities policy in conjunction with this process.**

<http://intra/content/policies-and-procedures/delegated-authority>

## Outline

As part of the push to empower Branch personnel to meet Customer needs, the responsibility for Invoice back out and Manual credit now lies in the Branch.

Trained personnel are authorised to complete Invoice back out and Manual credit within their assigned ‘Expenses’ Delegated Authority levels.



## Process

1. Need for Service credit is identified
2. Is invoice back out or manual credit the best method to achieve credit?
   1. Invoice back out – see step 3 for details
   2. Manual credit – see step 9 for details
3. Invoice back out – This means the customer will receive a full credit and have fresh credit terms to pay the invoice once re-invoiced
4. Establish the credit value
   1. For Invoice back out, this is the difference between the original invoice value and the intended re-invoice value (exclusive of GST).
   2. For Manual credit, this is the total value of the credit (exclusive of GST)
5. Is the credit value within my delegated authority levels?

Refer to the Delegations table above for clarification

* 1. Yes – move to step 6
  2. No – move to step 10

1. Are you completing an invoice back out or manual credit
   1. Invoice back out – move to step 7
   2. Manual credit – move to step 12
2. Invoice back out – Complete the Invoice back out as per SOP, [SER\_5.5 Back out a Service Invoice](http://intra/files/ser-5-5-sop-backout-a-service-invoice---march-2016-pdf-gY5Tij.pdf)
3. End
4. Manual credit – This is a value credit. It does not change the credit terms of the original invoice
5. No – Seek manger approval via email then go to step 11
6. Once approved by your manager; all supporting documentation needs to be available for audit review. Attach this documentation within NAXT. See [QRG Document handler](http://intra/files/qrg---document-handler---march-2016-pdf-2rFyVD.pdf) for instructions on how to complete this task
7. Complete manual credit using QRG, [Manual credit](http://intra/search/manual%20credit)

## Process Overview

