

Reason Codes Overview

Some transactions require additional explanation. This can be provided by way of a custom Reason Code.

In this training course you will be introduced to Reason Code Types and shown how to add, change and delete a Reason Code.

Reason Code Types are used to group together similar Reason Codes.

To access them, open System Manager, choose the 'General' view, and then select 'Reason Codes'.

The Reason Types correspond to the kind of transactions they are used with and are pre-determined in your BisTrack system.

The 'Reason Type' determines which fields are available for each related Reason Code.

Notice that some of the 'Cash Refund' codes have an additional setting that is not included in other Reason Codes such as a 'Quote Rejection'.

Some important 'Reason Code Types' that you will want to review include; Cash Refund and Credit Note, , Direct Posting, Quote Rejection Lodgement for use with Cash Drawer Balancing , and Non-Sufficient Funds for use with Accounts Receivable.

To add a new 'Reason Code', click on the 'New' icon in the upper left corner of the window.

Select the 'Type' from the drop down list.

This will determine the remaining fields required for entry.

Selecting a 'Quote Rejection' type has only a 'Code' and 'Name' to be entered.

While a 'Credit Note' allows for a 'Code', 'Name' and 'Restock charge'.

The 'Restock charge' entry is optional.

When using a percentage, include a percentage sign after the value entered.

Press 'Add'.

The new 'Reason Code' is shown within the Credit Note 'Reason Types'.

To change a Reason Code, double click on the selected line.

Make any needed changes and press 'OK'.

Your changes appear in the list.

On the 'General' tab of a new Credit Note transaction, the 'Reason' you added and modified is now in the list of choices.

To delete a previously added Reason Code, identify it in the list and right click.

Select 'Delete' and then confirm by clicking 'Yes'.

The Reason Code is no longer in the list.

Deleted Reason Codes are still visible for past transactions that have used them.

Reason Codes are organized by their Reason Type. Be sure to familiarize yourself with the preset options.

You should now be able to modify those if needed and add or delete your own.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2016 Epicor Software Corporation. All rights reserved.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit www.epicor.com.



Corporate Office

804 Las Cimas Parkway
Austin, TX 78746
USA

Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean

Bldv. Antonio L. Rodriguez #1882 Int.104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico

Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom

Phone: +44.1344.468468
Fax: +44.1344.468010

Asia

238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore

Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia

Phone: +61.2.9927.6200
Fax: +61.2.9927.6298