

How To Create A Credit Note And Refund

1

Navigate to <https://sellers.truckpartsinventory.com/sellers>

Sellers Dashboard

⚠ Looks like you don't have any credits. Your parts will not display to the public until you [purchase credits](#) for your account. ✕

Sales Information

Sales [More Details](#) Past 30 days

\$ Sales (less returns) * \$89,178.00	\$ Returns * \$150.00
📦 Items Sold ** 56	\$ Your Sales * \$1,100.00

*Does not include tax or core charge
**Includes other and non-stock items

Inventory [Manage Inventory](#)

📈 Currently Displayed Parts 0	📈 Currently Displayed Trucks/Trailers 0
📄 Public Active Parts Missing Media 3,141	📄 Public Active Trucks/Trailers Missing Media 217
★ Average Parts Content Rank ★★★★☆	\$ Total Parts Inventory Value \$7,881,398.15

Exposures [Go to Exposures](#)

[Purchase Credits](#)

2 Click "Connect"

The screenshot shows the TPI PARTSLINK Sellers Dashboard. The sidebar on the left contains a menu with the following items: Sellers, Post, Seek, **Connect** (highlighted with an orange circle), and \$ Profit. The main content area is titled "Sellers Dashboard" and includes a warning message: "Looks like you don't have any credits. Your parts will not display to the public until you [purchase credits](#) for your account." Below this is the "Sales Information" section, which is divided into "Sales" and "Inventory" tabs. The "Sales" tab shows a summary of sales for the past 30 days, including Sales (less returns) of \$89,178.00, Returns of \$150.00, Items Sold of 56, and Your Sales of \$1,100.00. The "Inventory" tab shows a summary of inventory, including Currently Displayed Parts (0), Currently Displayed Trucks/Trailers (0), Public Active Parts Missing Media (3,141), Public Active Trucks/Trailers Missing Media (217), Average Parts Content Rank (3 stars), and Total Parts Inventory Value (\$7,881,398.15).

Sellers Dashboard

Looks like you don't have any credits. Your parts will not display to the public until you [purchase credits](#) for your account.

Sales Information

Sales [More Details](#)

Past 30 days

Sales (less returns) *
\$89,178.00

Returns *
\$150.00

Items Sold **
56

Your Sales *
\$1,100.00

*Does not include tax or core charge
**Includes other and non-stock items

Exposures [Go to Exposures](#)

Inventory [Manage Inventory](#)

Currently Displayed Parts
0

Currently Displayed Trucks/Trailers
0

Public Active Parts Missing Media
3,141

Public Active Trucks/Trailers Missing Media
217

Average Parts Content Rank
★ ★ ★ ★ ★

Total Parts Inventory Value
\$7,881,398.15

3 Click "Sales Overview" if you want to search for the transaction by number, or you can select "Companies" and look up the transaction by searching Companies.

The screenshot shows the TPI PARTSLINK Sellers Dashboard. The sidebar on the left contains a menu with the following items: Sellers, Back, Companies, Commlogs Overview, **Sales Overview** (highlighted with an orange circle), Batching, + New Quote/Invoice, Orders Overview, + New Purchase Order, + New Item Receipt, Cores, and Missed Sales. The main content area is titled "Sellers Dashboard" and includes a warning message: "Looks like you don't have any credits. Your parts will not display to the public until you [purchase credits](#) for your account." Below this is the "Sales Information" section, which is divided into "Sales" and "Inventory" tabs. The "Sales" tab shows a summary of sales for the past 30 days, including Sales (less returns) of \$89,178.00, Returns of \$150.00, Items Sold of 56, and Your Sales of \$1,100.00. The "Inventory" tab shows a summary of inventory, including Currently Displayed Parts (0), Currently Displayed Trucks/Trailers (0), Public Active Parts Missing Media (3,141), Public Active Trucks/Trailers Missing Media (217), Average Parts Content Rank (3 stars), and Total Parts Inventory Value (\$7,881,398.15).

Sellers Dashboard

Looks like you don't have any credits. Your parts will not display to the public until you [purchase credits](#) for your account.

Sales Information

Sales [More Details](#)

Past 30 days

Sales (less returns) *
\$89,178.00

Returns *
\$150.00

Items Sold **
56

Your Sales *
\$1,100.00

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Exposures [Go to Exposures](#)

Inventory [Manage Inventory](#)

Currently Displayed Parts
0

Currently Displayed Trucks/Trailers
0

Public Active Parts Missing Media
3,141

Public Active Trucks/Trailers Missing Media
217

Average Parts Content Rank
★ ★ ★ ★ ★

Total Parts Inventory Value
\$7,881,398.15

4 Click the "Search" field if you know the ID number.

The screenshot shows the TPI PARTSLINK Sales Overview page. The left sidebar contains navigation links: Sellers, Post, Seek, Connect, and Profit. The main content area has a header with the TPI logo and PARTSLINK text. Below the header, there's a breadcrumb trail: Truck Parts Inventory / Sellers / Sales Overview. The main heading is 'Sales Overview'. Below this, there's a filter bar with a date range (Jan 27, 2025 - Feb 25, 2025), a 'Types' dropdown, a 'Paid/Unpaid' dropdown, and a 'Transaction Labels' dropdown. A search bar is highlighted with an orange circle. Below the search bar, there's a table with columns: ID, Status, Company, Contact, Sales Person, Labels, Date, Total, and Options. The table contains 15 rows of data.

ID	Status	Company	Contact	Sales Person	Labels	Date	Total	Options
2591	Invoice	Cash Customer		Adrian Chan		24 Feb 2025	\$28.22	
2590	Invoice	Cash Customer		Dana George		19 Feb 2025	\$5,813.06	
2589	Invoice	Cash Customer		Dana George		19 Feb 2025	\$18,571.32	
2588C	Credit Note	Stacey Test Customer		Stacey Reis		18 Feb 2025	\$112.88	
2588	Invoice	Stacey Test Customer		Stacey Reis		18 Feb 2025	\$112.88	
2587	Sales Receipt	Just For Fun		Scott Tetz		14 Feb 2025	\$338.63	
2586	Approved Inv...	Angel's	Leif Noe	Scott Tetz		14 Feb 2025	\$3,284.31	
2585	Invoice	AJ Bayless	Jessie Med...	Scott Tetz		12 Feb 2025	\$282.19	
2584	Sales Receipt	Cash Customer		Dana George		10 Feb 2025	\$22.58	
Q1434	Quote	Cash Customer		George G		10 Feb 2025	\$507.94	
Q1433	Quote	Adapt		George G		10 Feb 2025	\$1,631.04	
Q1432	Quote	Cash Customer		Aaron Siew		10 Feb 2025	\$3,942.69	
Q1431	Quote	testy		Aaron Siew		10 Feb 2025	\$564.39	
2583	Sales Receipt	Testing Company Ltd.		Adrian Chan		10 Feb 2025	\$12,416.25	

5 Click on the ID number to enter into the transaction details.

The screenshot shows the TPI PARTSLINK Sales Overview page. The left sidebar contains navigation links: Sellers, Post, Seek, Connect, and Profit. The main content area has a header with the TPI logo and PARTSLINK text. Below the header, there's a breadcrumb trail: Truck Parts Inventory / Sellers / Sales Overview. The main heading is 'Sales Overview'. Below this, there's a filter bar with a date range (Jan 27, 2025 - Feb 25, 2025), a 'Types' dropdown, a 'Paid/Unpaid' dropdown, and a 'Transaction Labels' dropdown. A search bar is present. Below the search bar, there's a table with columns: ID, Status, Company, Contact, Sales Person, Labels, Date, Total, and Options. The table contains 1 row of data. The ID '2582' is highlighted with an orange circle. Below the table, there's a pagination bar with links: First, Previous, Page 1 of 1, Next, Last.

ID	Status	Company	Contact	Sales Person	Labels	Date	Total	Options
2582	Sales Receipt	Action Auto		Paul C		10 Feb 2025	\$75.00	

6 Click "More Options" to credit the transaction.

Truck Parts Inventory / Sellers / Companies / Action Auto / Sales Receipt 2582

Sales Receipt 2582

Action Auto Northbrook, Illinois
Balance: \$786.45

Primary 312-393-2645
Primary Fax 312-393-5555
Email JesseSTaylor@gustr.com

[Overview](#) [Print Options](#) [Email](#) [Attachments](#) [More Options](#)

Sales Receipt 2582

Sales Person Paul C
Sold On February 10, 2025
Payment Method Cash
Cash Received: \$75.00
Change: \$0.00

Bill To
Action Auto
711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

Ship To
Action Auto
711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

Items	Price	Quantity	Line Total	Tax
DMV License Fees	75.00	1	75.00	E
			Subtotal	75.00
			Total Tax	0.00
			Paid	\$75.00

7 Click "Credit Transaction"

Truck Parts Inventory / Sellers / Companies / Action Auto / Sales Receipt 2582

Sales Receipt 2582

Action Auto Northbrook, Illinois
Balance: \$786.45

Primary 312-393-2645
Primary Fax 312-393-5555
Email JesseSTaylor@gustr.com

[Overview](#) [Print Options](#) [Email](#) [Attachments](#) [More Options](#)

Sales Receipt 2582

Sales Person Paul C
Sold On February 10, 2025
Payment Method Cash
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Bill To
Action Auto
711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

Ship To
Action Auto
711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

Items	Price	Quantity	Line Total	Tax
DMV License Fees	75.00	1	75.00	E
			Subtotal	75.00
			Total Tax	0.00
			Paid	\$75.00

[Add Sales Receipt Reminder](#)
[Create Similar Quote](#)
[Credit Transaction](#)
[Edit Transaction](#)
[Logs](#)
[Arrange LTL Shipping](#)

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Any bolded font field is mandatory to fill out, and field without bolded font are optional.

Truck Parts Inventory / Sellers / Companies / Credit Note

Credit Note

Sales Receipt # **2582**
Reference

Reason for Credit

Company / Contact

Company Action Auto
Contact Search name, phone, or email

Information

Sales Person Paul C
PO #
Ship Via
Labels
Commission Value Private
Credit Method Cash
Payment Notes
Setting Default
Warranty Value Public

Credit To **Ship To** **Notes** **Private Notes**

711 Pringle Drive 711 Pringle Drive

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You can add Notes which will be visible when printing the transaction details for the customer, or Private Notes which will not be included when printing or emailing (and only viewable to staff on TPI).

Company Action Auto
Contact Search name, phone, or email

Information

Sales Person Paul C
PO #
Ship Via
Labels
Commission Value Private
Credit Method Cash
Payment Notes
Setting Default
Warranty Value Public

Credit To **Ship To** **Notes** **Private Notes**

711 Pringle Drive 711 Pringle Drive
Northbrook, IL 60062 Northbrook, IL 60062
United States United States
312-393-2645 312-393-2645

Item	Price	Quantity	Line Total	Tax
DMV License Fees	\$75	1	\$75.00	E
Subtotal			\$75.00	
Total Tax			\$0.00	

+ Credit other item + Credit non-stock item + Credit Core Exchange

10

You can select the blue downward arrow beside a line item to remove that item from the credit note.

You can adjust the price you are crediting each item for by clicking into the price box for that line item and typing the amount you would like.

You can adjust tax settings for each line item.

You can add different line items to the credit note using the yellow buttons.

The screenshot shows a credit note form with the following sections:

- Sales Person:** Paul C
- Credit Method:** Cash
- PO #:** (empty)
- Payment Notes:** (empty)
- Ship Via:** (empty)
- Labels:** (empty) with a blue question mark icon.
- Setting:** Default
- Commission:** Value, Private (with a red X icon)
- Warranty:** Value, Public (with a red X icon)
- Credit To:** 711 Pringle Drive, Northbrook, IL 60062, United States, 312-393-2645
- Ship To:** 711 Pringle Drive, Northbrook, IL 60062, United States, 312-393-2645
- Notes:** (empty)
- Private Notes:** (empty)
- Item Table:**

Item	Price	Quantity	Line Total	Tax
DMV License Fees	\$75	1	\$75.00	E
- Yellow Buttons:** + Credit other item, + Credit non-stock item, + Credit Core Exchange
- Summary:**

Subtotal	\$75.00
Total Tax	\$0.00
Credit Total	\$75.00
- Buttons:** Add Shipping, Credit
- Feedback:** (red icon)

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Once you have ensured all the information is correct, select "Credit" at the bottom of the page.

Commission Value Private Warranty Value Public

Credit To **Ship To** **Notes** **Private Notes**

711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

Item	Price	Quantity	Line Total	Tax
DMV License Fees	\$75	1	\$75.00	E

+ Credit other item + Credit non-stock item + Credit Core Exchange

Subtotal \$75.00

Add Shipping Total Tax \$0.00

Credit Total \$75.00

Credit
Save and credit.

BUY PARTS **SELL PARTS** **RESOURCES** **COMPANY**

Search For Parts Feedback TPI Features Facebook Group About Us

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Click "Create credit note"

PO #

Ship Via

Labels

Commission Value Private Warranty Value Public

Credit To **Ship To** **Notes** **Private Notes**

711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

Item	Price	Quantity	Line Total	Tax
DMV License Fees	\$75	1	\$75.00	E

+ Credit other item + Credit non-stock item + Credit Core Exchange

Subtotal \$75.00

Add Shipping Total Tax \$0.00

Credit Total \$75.00

Credit
Save and credit.

Confirm credit note

Please confirm this credit note is ready to be credited.

Cancel **Create credit note**

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You have now added this amount as a credit to the companies account. This does **not** represent a transactional refund has been processed. If you would like to perform a refund, please continue on. A refund represents the exchange of funds back to the company.

Truck Parts Inventory / Sellers / Companies / Action Auto / Credit Note 2582C

Credit Note 2582C

Northbrook, Illinois
Balance: \$711.45

Primary

Primary Fax

Email

312-393-2645

312-393-5555

JesseSTaylor@gustr.com

Overview

Print Options

Email

Refund

Attachments

More Options

Credit Note 2582C

Credit Reason: Did not fit their needs

Sales Person	Paul C	Credit Method	Cash
Credited On	February 25, 2025		

Credit To
Action Auto
711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

Ship To
Action Auto
711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

Items	Price	Quantity	Line Total	Tax

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Select "Refund" if you are exchanging funds back to the company (ie. returning money via cash, card, cheque, or other method).

Truck Parts Inventory / Sellers / Companies / Action Auto / Credit Note 2582C

Credit Note 2582C

Northbrook, Illinois
Balance: \$711.45

Primary

Primary Fax

Email

312-393-2645

312-393-5555

JesseSTaylor@gustr.com

Overview

Print Options

Email

Refund

Attachments

More Options

Credit Note 2582C

Credit Reason: Did not fit their needs

Sales Person	Paul C	Credit Method	Cash
Credited On	February 25, 2025		

Credit To
Action Auto
711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

Ship To
Action Auto
711 Pringle Drive
Northbrook, IL 60062
United States
312-393-2645

Items	Price	Quantity	Line Total	Tax
DMV License Fees	75.00	1	75.00	E
			Subtotal	75.00
			Total Tax	0.00

15

Select the payment method for the refund. You can also adjust the amount of the refund being processed. And if there are more than one credit notes to apply the refund to, you will see the options listed below to apply refunds to multiple credit notes at once.

Truck Parts Inventory / Sellers / Companies / Action Auto / Add Refund

Add Refund

Action Auto Northbrook, Illinois
Balance: \$711.45

Primary 312-393-2645 Primary Fax 312-393-5555 Email JesseSTaylor@gustr.com

Reference No. 2582CR

Payables Due \$75.00

Amount 75.00

Refund Method Choose

Refund Date

Issued By

Check/Auth No. (optional)

Notes (optional)

Date	Credit Note	Original Total	Amount Due	Payment
25 Feb 2025	2582C	\$75.00	\$75.00	75.00

Show All Outstanding Transactions

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Once you have filled out all the correct information, select "Save Refund"

Primary 312-393-2645 Primary Fax 312-393-5555 Email JesseSTaylor@gustr.com

Reference No. 2582CR

Payables Due \$75.00

Amount 75.00

Refund Method Cash

Refund Date 2025-02-25 15:22

Issued By Stacey Reis

Check/Auth No. (optional)

Notes (optional)

Date	Credit Note	Original Total	Amount Due	Payment
25 Feb 2025	2582C	\$75.00	\$75.00	75.00

Show All Outstanding Transactions

Totals		\$75.00	\$75.00	\$75.00
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Cancel **Save Refund** Pay With Debit/Credit Card

Feedback Action List 5

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You will notice the "credit" amount is no longer on the company's account, as that credit has now be translated to a refund back to the company.

Truck Parts Inventory / Sellers / Companies / Action Auto / Refund

Refund

Successfully saved the transaction.

Action Auto Northbrook, Illinois
Balance: \$786.45

Primary: 312-393-2645 | Primary Fax: 312-393-5555 | Email: JesseSTaylor@gustr.com

Print PDF Email Edit Void

2582CR 25 February 2025 **75.00**

Issued By: Stacey Reis
Payment Method: Cash
Billed To: Action Auto
711 Pringle Drive
Northbrook, Illinois
United States, 60062

Allocations

Type	Date	Allocated
Credit Note - 2582C	25 February 2025	75.00

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You can choose to print, download or email the refund transaction using the menu items here.

Truck Parts Inventory / Sellers / Companies / Action Auto / Refund

Refund

Successfully saved the transaction.

Action Auto Northbrook, Illinois
Balance: \$786.45

Primary: 312-393-2645 | Primary Fax: 312-393-5555 | Email: JesseSTaylor@gustr.com

Print PDF Email Edit Void

2582CR 25 February 2025 **75.00**

Issued By: Stacey Reis
Payment Method: Cash
Billed To: Action Auto
711 Pringle Drive
Northbrook, Illinois
United States, 60062

Allocations

Type	Date	Allocated
Credit Note - 2582C	25 February 2025	75.00

Total Refunded 75.00