

Should the occasion arise to create a credit note. This can be done by accessing the Credit Notes icon in the Accounting Tab.

There are two kinds of Credit Notes you might want to create, a Miscellaneous credit note or a Credit note related to a specific Job Invoice or Excess Invoice. How to do both will be explained below.

AccountingMain


Creating a Credit Note

Should you need to create a credit note linked to a specific Job Invoice or Excess Invoice you will need to make use of the Reverse button on the Invoices screen. *The How To is Documented in [Reversing an Invoice](#)*

The Credit Note will be created after the Reversal.

Creating a Miscellaneous Credit Note

MiscCredit

Select the appropriate account number using the lookup () button.

Indicate the Reason for the Credit Note you wish to create.

In the Credit Note Line details section of the window enter the following information:

-Description

-Qty

-Item Price

-Assign a GL Code to the entry.

Once all lines have been added, click **OK** to save and create the credit note.

Credit Notes