

Create Credit Notes

Objectives

- Create Credit Notes

Steps

In E-Invoicing, after saving an open invoice, you will no longer be able to edit it or make any changes.

When the client decides to discard a service that has been invoiced, a credit note should be created.

To do that, go to the specific invoice, click on the action wheel at the top right of the General info section, and record a credit note to this invoice.

General InfoPayment MadeAttachmentsEmail

INV0000023

BLP Industry - SAR

BLP Industry 123 12345, 1234, Riyadh, Saudi Arabia... Show More

2023-03-08

2023-04-07

(No Data)

30 Days

(No Data)

(No Data)

Tax Invoice

Nominal

Credit transfer

Matters Linked

Summary

Sub Total

SAR 8,600.00

Total Tax

SAR 0.00

Total

SAR 8,600.00

Invoice TemplateZatca invoice

Invoice StatusPartially paid

Approval StatusApproved

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فاتورة ضريبة

TAX INVOICE

Invoice #INV0000023

Date2023-03-08

Due On2023-04-07

Exchange Rate1 SAR = 1 SAR

Matter NameLegal opinion for service agreement for BLP, Acquire the company of BLP

مرجع الفاتورة

التاريخ

تاريخ الاستحقاق

سعر الصرف

عنوان المسألة

QR Code

Create Credit Note

Create Debit Note

The system will fetch the data related to this invoice. You must specify the reason, and then you can delete the invoice items that the client has discarded.

This credit note will also have a status, either Draft or Open. Once you save it, the same restrictions will be applied. In other words, if the credit note is saved with an Open Status, you cannot change it, delete it, or return its status to draft.

Credit Notes ListEdit Credit Note

DraftOpenSave Credit Note

Client AccountPaul Jones

CurrencySAR

Exchange Rate1 SAR = 1 SAR

Date2023-03-01

Terms30 Days

ReasonReturned items

Credit Note Reference

Invoice TypeTax Invoice

Transaction TypeSummary

Bill ToPaul JonesP.O 1236 Riyadh

Credit Note Description

1 Matters Linked

MatterM00000175

Matter NamePaul Jones Vs Basil Crown Contracting Case

Assignee

Practice AreaConstruction, Contracting

Credit Note Summary

StatusDraft

Invoice CreditedINV0000014

Client NamePaul Jones

Date2023-03-01

Credit Note Reference

Terms30 Days

Sub Total (SAR)1,050.00

Total Discount (SAR)0.00

Total Tax (SAR)0.00

Total1,050.00 SAR

Credit Note Details

DateItemDescriptionQuantityUnit Price (SAR)Tax (%)Amount (SAR)

03/01/2023UC1Attending1.5300SARSelect a Tax450.00

03/01/2023UC6Meeting2300SARSelect a Tax600.00

This credit note will have then an automatic number generated by the system.

You can list all the credit notes under the invoices section, and of course, you can export the list for internal use.

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

My instance-E-invoice - SAR

Credit Notes List

View All Invoices

Add Invoice

View All Quotes

Add New Quote

View All Credit Notes

Export List

Choose columns

Credit Note	Invoice Number	Invoice Date	Invoice Total	Client Account	Client	Total	Balance
CN0000009	14	2023-03-01	1,050	Paul Jones	98	600	0
CN0000008	INV0000013	2023-03-01	6,200	Paul Jones	98	5,800	0
CN0000007	INV0000012	2023-02-20	600	BLP Industry	70	600	0
CN0000006	INV0000011	2023-02-16	10,000	Brand Line Company	73	5,000	0
CN0000005	INV0000007	2022-07-18	10,700	BTL Insurance	79	2,000	0
CN0000004	INV0000007	2022-07-18	10,700	BTL Insurance	79	3,700	0
DRFT0000001	INV0000005	2022-07-18	7,000	Brand Line Company	73	6,000	0
CN0000003	INV0000004	2022-06-02	10,000	Advanced Industries	41	7,000	0

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1 - 10 of 12 items

After deleting the items that have been discarded by the client with the credit note, the invoice status will be partially paid.

For more information on LEXZUR, reach out to us at help@lexzur.com.

Thank you!