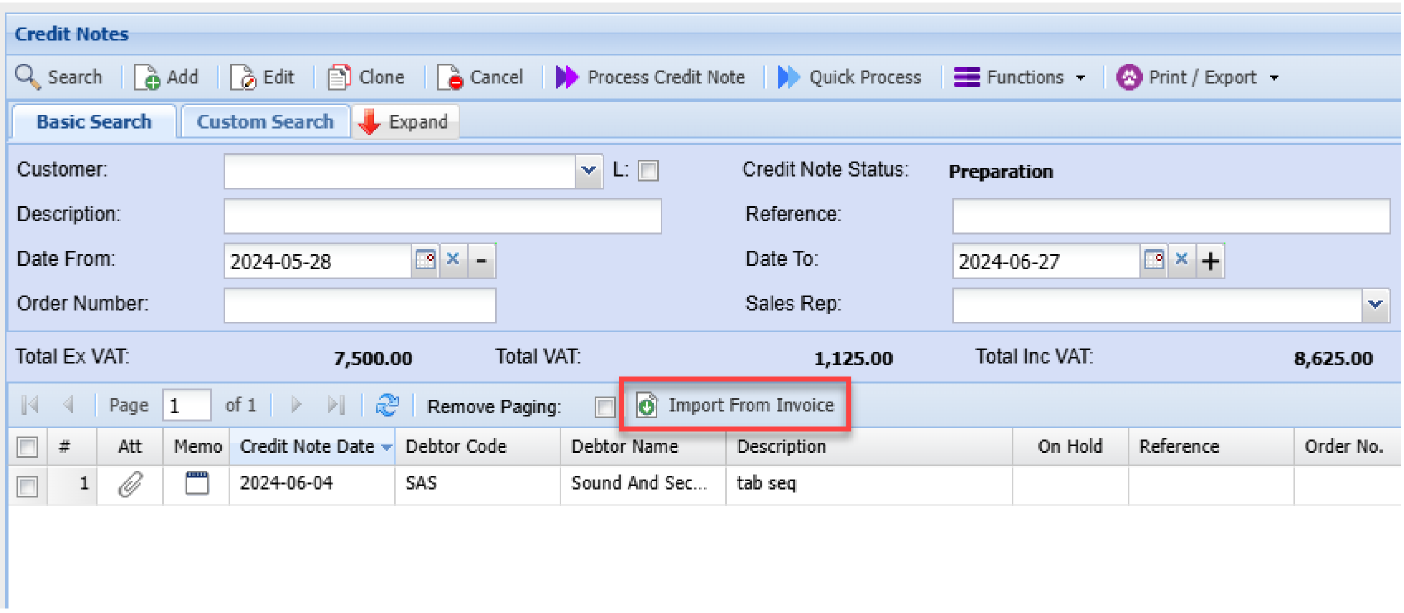
Import Invoice to Credit Note

The simplest way of creating a credit note by simply “Import from invoice”

You can however use the long method of capturing

Open Debtors Module> Activity > Credit Note

Select Import from Invoice



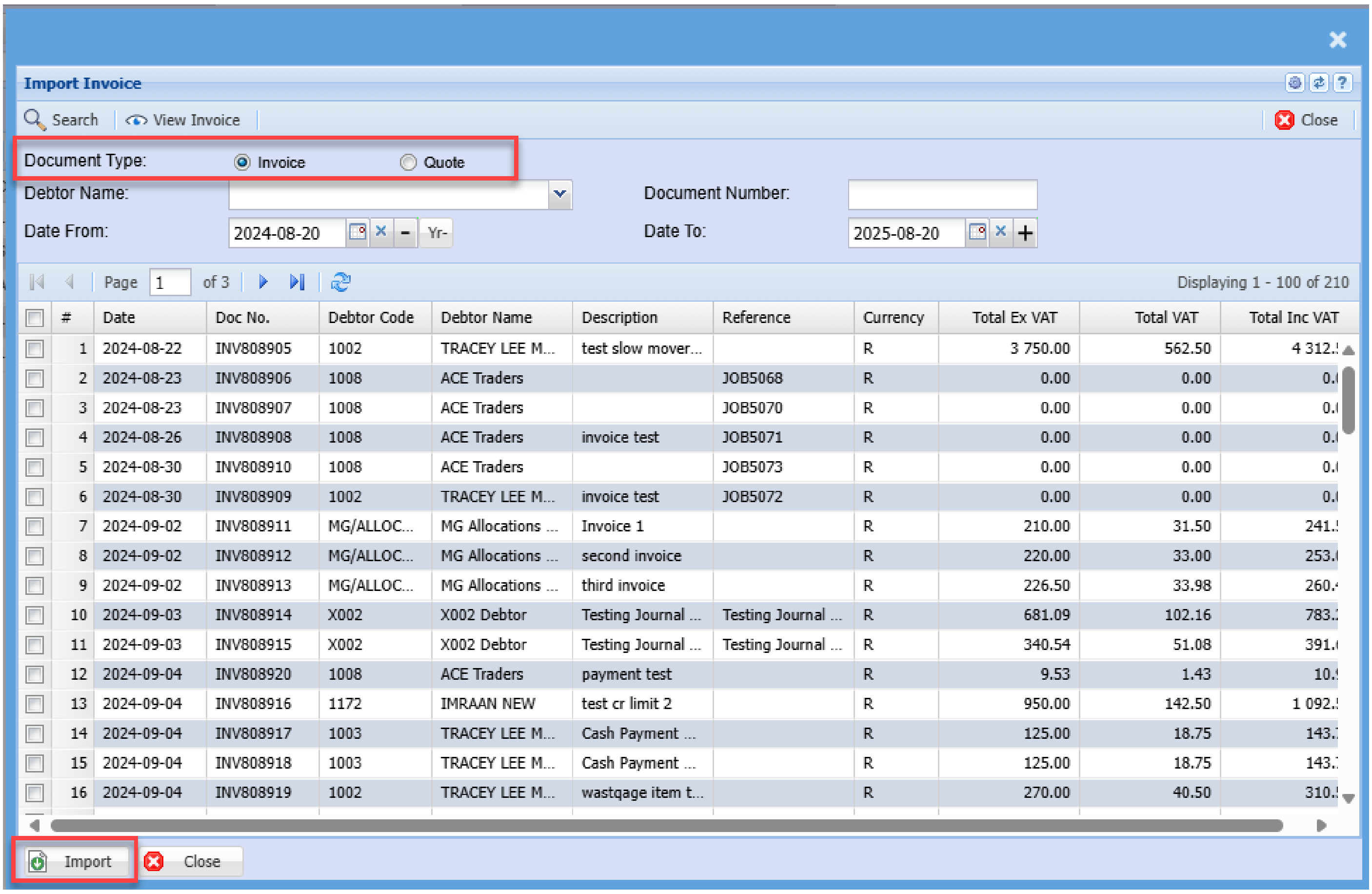
Search by document number or customer, remember the date range also counts.

The default option is to import from an invoice or import from a quote.

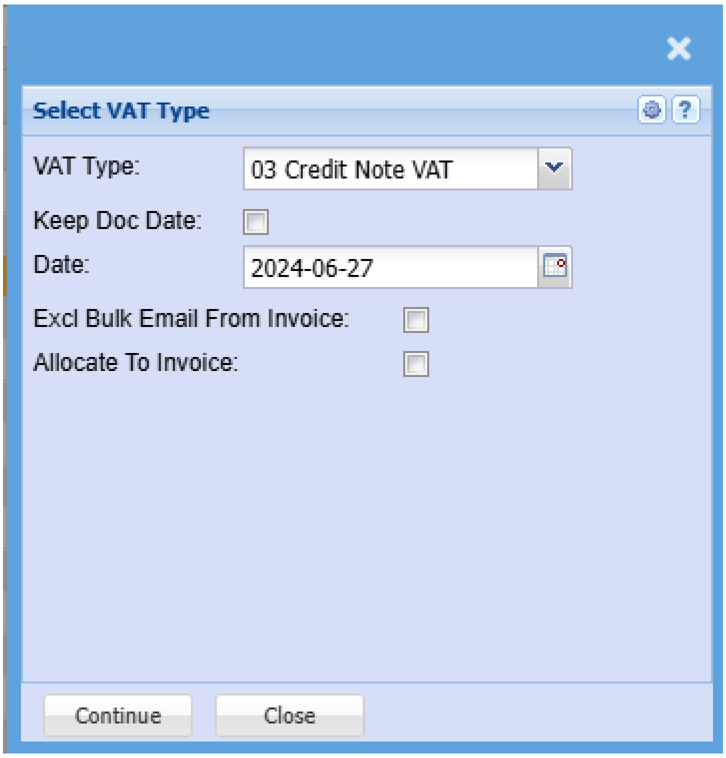
> Importing from quote helps keep the Task build structure in place for Credit note

You can view the invoice to verify that it’s the correct one you want to reverse by clicking on the view invoice button.

Click on the Import button to create a credit note



And Click Continue

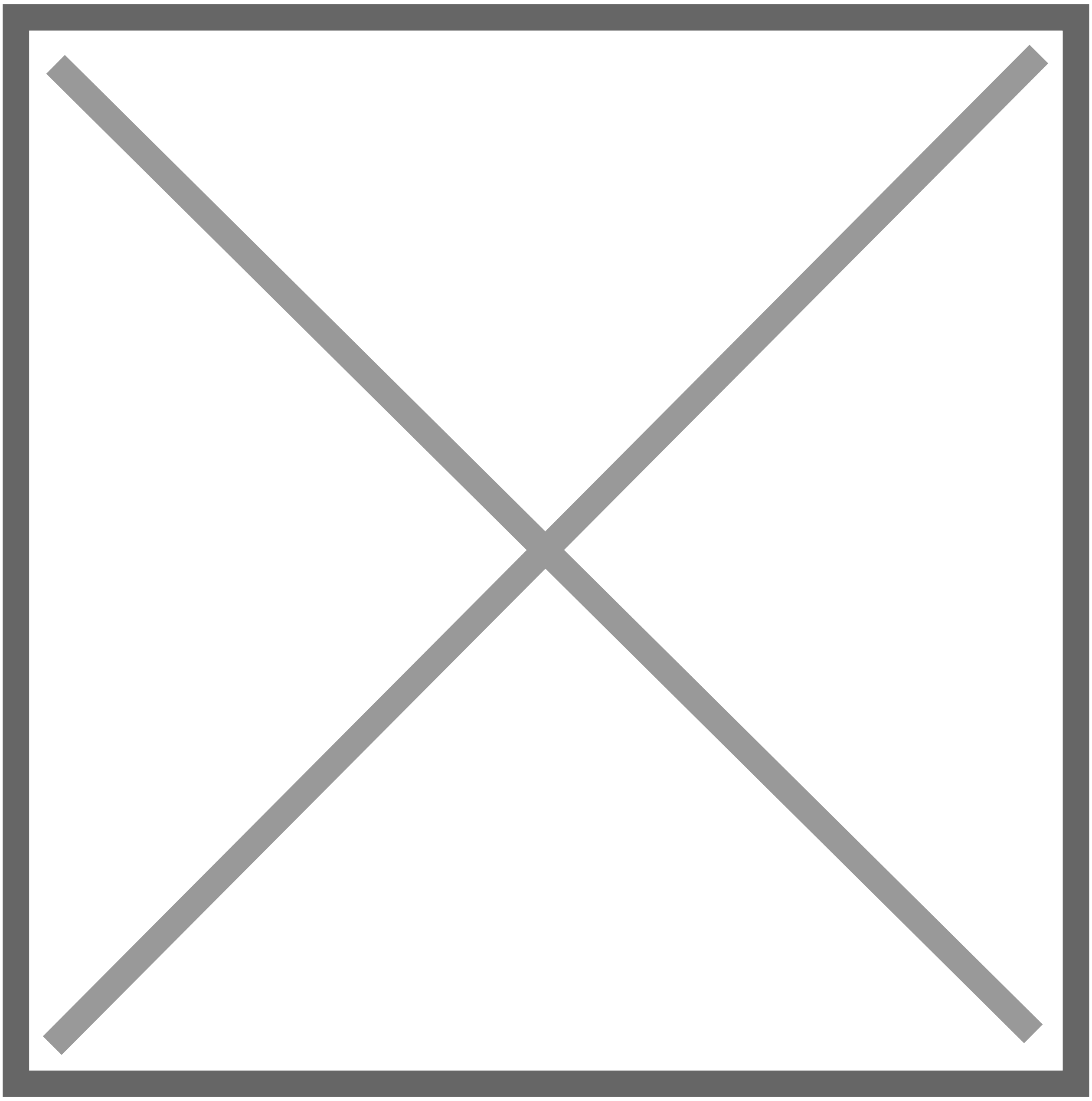


VAT / GST Type	Select the correct Tax Type for Credit Note
Keep Doc Date	Enforce credit note to make date same as invoice date

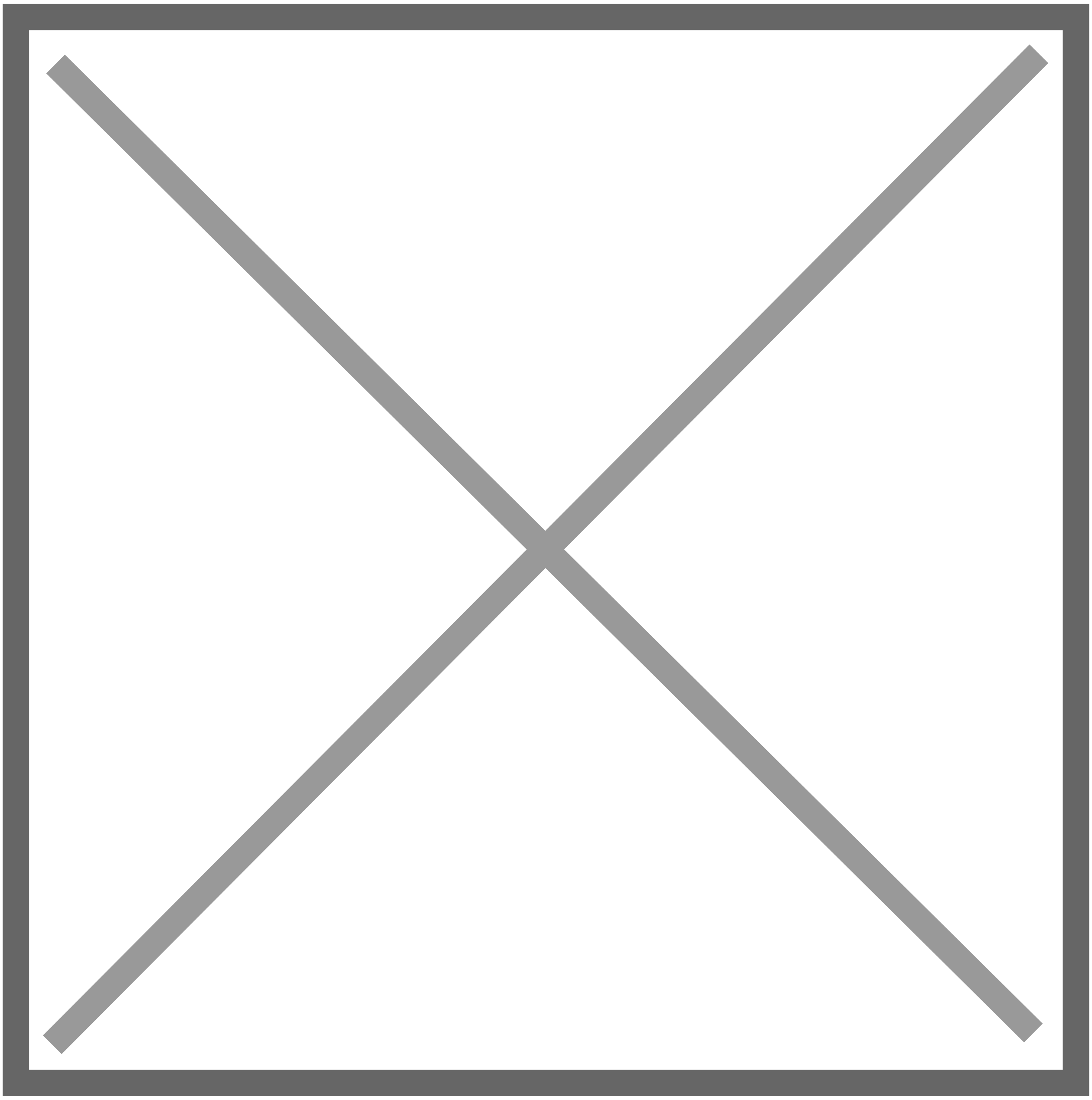
Date	Put in a date for credit note
Excl Bulk Email from Invoice	Put this tick on to mark invoice to not be sent out when using Bulk email invoice function
Allocate to Invoice	Automatically allocate the credit note to invoice after processing the credit note

If one changes the customer of the imported invoice to credit note, the Allocate to invoice will be cleared. No automatic allocation will occur

The credit note will now be under preparation status in the credit notes waiting to be processed



Click On process Credit note to process this document



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