

How to Set Credit Note and Debit Note Number Prefix

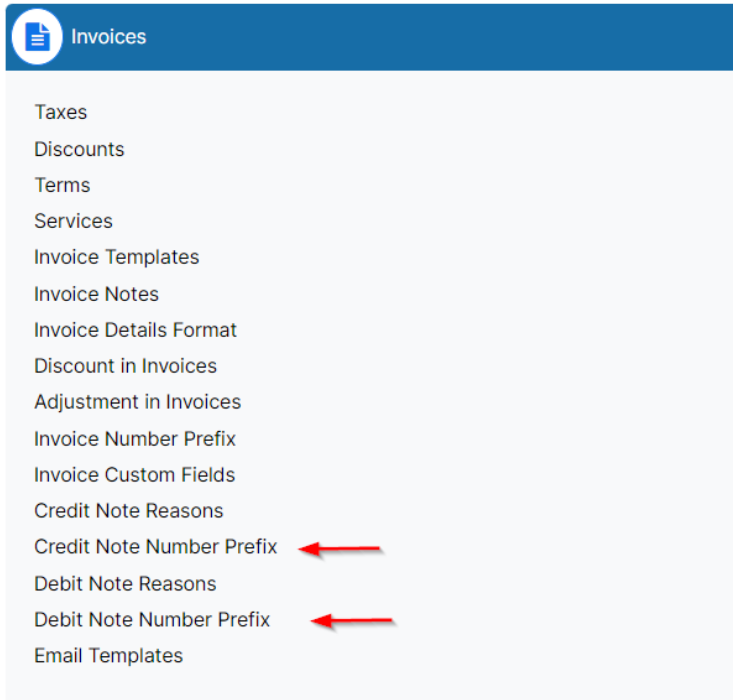
Objectives

- Set Credit Note Prefix Number
- Secondary Credit Note Prefix
- Set Debit Note Prefix Number

Steps

The Billing Module in LEXZUR allows you to set your credit and debit note number prefixes for the organization and categorization of the billing processes.

To do so, open the Billing Settings(**BillingAdvanced Settings**), then choose **Credit Note Number Prefix** from the **Invoices** section:



Here you can include a unique alphanumeric prefix before the sequential number.

Additionally, LEXZUR offers the functionality of a Secondary Credit Note Prefix. This feature allows users to further customize credit note numbering based on specific criteria, such as client type, location, or any other preferred identifier. By enabling the Secondary Credit Note Number Prefix, you can create distinct numbers for different categories of clients or regions.

[Settings](#) / Credit Note Number Prefix

Credit Note Number Prefix

Credit Note Number Prefix

CRD

☒ Enable Credit Note Number Secondary Prefix

Credit Note Number Secondary Prefix

EXT

Save

Similarly, to set the **Debit Note Number Prefix**, select the option from the **Invoices** Settings section, and set the desired prefix.

Dashboards
Clients
Invoices
Expenses
Time Entries
Suppliers
Partners
Reports
Advanced
App4Legal-USD - USD

Settings / Debit Note Number Prefix

Debit Note Number Prefix

Save

The system will then allow you to easily select the desired credit note prefix type when creating a credit note.

Dashboards
Clients
Invoices
Expenses
Time Entries
Suppliers
Partners
Reports
Advanced
App4Legal-USD - USD

Credit Notes List
Edit Credit Note
Draft
Open
Save Credit Note

Client Account
John Marven

Date
2023-08-16

Bill To
John Marven

Prefix Type
Credit Note Number Prefix
Credit Note Number Prefix
Credit Note Number Secondary Prefix

Currency
USD
Exchange Rate
1 USD = 1 USD

Reason
Returned items
Credit Note Reference

Credit Note Description

Credit Note Summary
Status
Draft
Credit Note #
CRD0000008
Invoice Credited
INT0000001
Client Name
John Marven
Date
2023-08-16
Credit Note Reference
Terms
In Advance
Sub Total (USD)
500.00
Total Discount (USD)
0.00
Sub Total After Discount (USD)
500.00
Total Tax (USD)
0.00
Total
500.00 USD

Credit Note Details

Date	Item	Description	Quantity	Unit Price (USD)	Tax (%)	Amount (USD)
08/16/2023	Office Expenses	Average monthly expenses	1	500	USD	500.00

These prefixes will be visible on the credit note and debit note number once it is generated.

Credit Notes List

Export List

Choose columns

Credit Note	Invoice Number	Invoice Date	Invoice Total	Client Account	Client	Total	Balance
EXT0000001	INT0000001	2023-08-16	500	John Marven	51	500	0
CRD0000007	INV0000101	2023-08-09	1,755.63	BLP Industry	67	450	0
CRD0000006	INV0000086	2023-05-30	5,400	BLP Industry	67	5,300	0

Invoices

Debit Notes

Save as

Export

Tools

1 - 6 of 6 items

Advanced

Columns

Invoice#	Client's Account	Client Account Number	Total	Payment Made	Balance Due	Currency	Status	Approval Stat...	Invoice Date
DN0000005	Brand Line Company - SAR	73	3,000.00 SAR	0.00	3,000.00	SAR	overdue	approved	2023-02-16
DN0000004	BTL Insurance - SAR	79	5,000.00 SAR	0.00	5,000.00	SAR	overdue	approved	2022-07-18

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

Thank you!