

# 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 Info

Payment Made

Attachments

Email

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

Total Tax

Total

SAR 8,600.00

SAR 0.00

SAR 8,600.00

Invoice Template

Invoice Status

Approval Status

Zatca invoice

Partially paid

Approved

THE CURRY LAW FIRM

Real Lawyers, Real Results

فاتورة ضريبة

TAX INVOICE

Invoice #

Date

Due On

Exchange Rate

Matter Name

INV0000023

2023-03-08

2023-04-07

1 SAR = 1 SAR

Legal 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 List

Edit Credit Note

Draft

Open

Save Credit Note

Client Account

Currency

Exchange Rate

Paul Jones

SAR

1 SAR = 1 SAR

Date

Terms

Reason

Credit Note Reference

2023-03-01

30 Days

Returned items

Invoice Type

Transaction Type

Credit Note Description

Tax Invoice

Summary

Bill To

1 Matters Linked

Paul Jones

Paul Jones Vs Basil Crown Contracting Case

Assignee

Practice Area

P.O.1256 Riyadh

M00000175

Paul Jones Vs Basil Crown Contracting Case

Construction, Contracting

Credit Note Summary

Status

Invoice Credited

Client Name

Date

Credit Note Reference

Terms

Sub Total (SAR)

Total Discount (SAR)

Total Tax (SAR)

Total

Draft

INV0000014

Paul Jones

2023-03-01

30 Days

1,050.00

0.00

0.00

1,050.00 SAR

Credit Note Details

Date

Item

Description

Quantity

Unit Price (SAR)

Tax (%)

Amount (SAR)

03/01/2023

UC1

Attending

1.5

300

SAR

450.00

03/01/2023

UC6

Meeting

2

300

SAR

600.00

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

2

>

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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](mailto:help@lexzur.com).

Thank you!