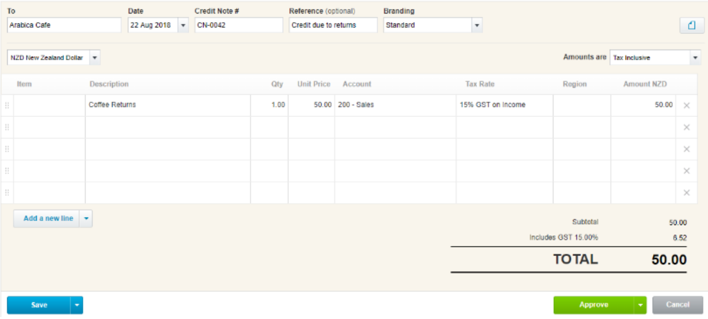
Creating Credit Notes

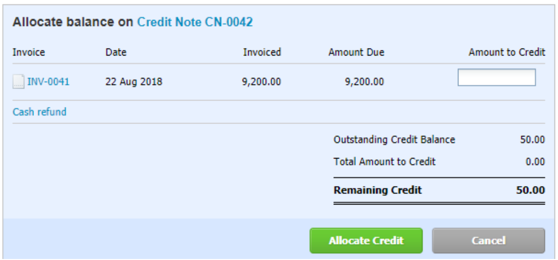
Option 1

1. Accounts
   Sales
   New
   Credit Note



2. Enter all information relating to the client (ensure the client name is correct)

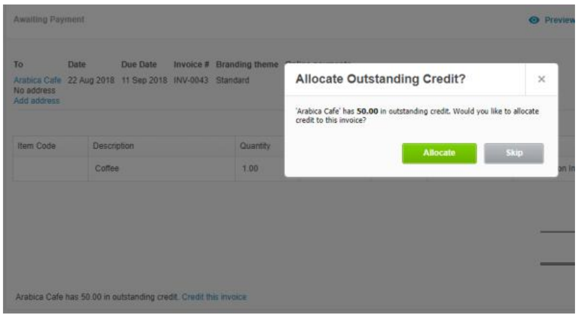
3. Approve the Credit Note



4. If there is already an invoice to that customer in the Xero it will prompt you to allocate it then.

5. If you want to apply it to another invoice (that has not yet been created) then cancel the allocation and the Credit Note will sit with your other awaiting payment invoices.

6. When you save the next invoice for that client it will give you the option to use up that credit. You can choose to do this or wait until another invoice.



Option 2

1. Open a current invoice.

2. Invoice Options – Add Credit Note

3. A new credit note will be created with all the information from the invoice. You can credit the full amount or only a portion.