

This is a guide to show how to credit an invoice.

## Step #1 - Find the Invoice

In the **Costing** grid find the **invoice** which needs to be **credited**.

Sales = £250.00 (Chg: 250.00) (Inv: 250.00)																	<input checked="" type="checkbox"/> Stacked View	Batch	Unb.
Client	InvNo	ChgCode	ChgDesc	Date	ChgAmount	ChgCurr	ChgROE	InvCurr	InvAmount	HomeROE	HomeAmount	HomeCurr	Charge Notes	Type	VatCode	VAT	CreatedBy	Created	
SIGMA01	INV000003	100	Airfreight	27/01/16	250.00	GBP	1.00	GBP	250.00	1.00	250.00	GBP		Invoice	Z	0.00	ADMIN	27/01/16	

## Step #2 - Add a New Line

Add a new line in the **Costing** grid.

Sales = £250.00 (Chg: 250.00) (Inv: 250.00)																	<input checked="" type="checkbox"/> Stacked View	Batch	Unb.
Client	InvNo	ChgCode	ChgDesc	Date	ChgAmount	ChgCurr	ChgROE	InvCurr	InvAmount	HomeROE	HomeAmount	HomeCurr	Charge Notes	Type	VatCode	VAT	CreatedBy	Created	
SIGMA01	INV000003	100	Airfreight	27/01/16	250.00	GBP	1.00	GBP	250.00	1.00	250.00	GBP		Invoice	Z	0.00	ADMIN	27/01/2016	
SIGMA01	...			27/01/16	0.00	GBP	1.00	GBP	0.00	1.00	0.00	GBP		Invoice		0.00	ADMIN	27/01/2016	

## Step #3 - Enter the Information

In the new line replicate the information of the **invoice** which needs to be **credited**.

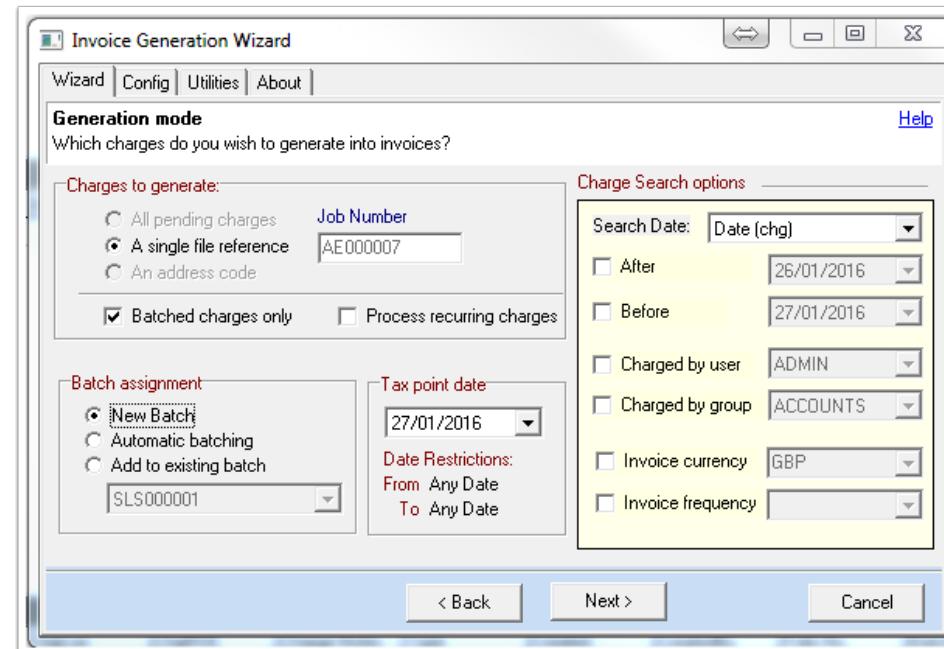
The **Type** field is the only field which needs to be changed. It should be set to **Credit Note**.

Save the changes to this line, then click the **Raise Line** button.

Charges   Internal Charges   All Transactions   Totals																	<input checked="" type="checkbox"/> Stacked View	Batch	Unl
Sales = £250.00 (Chg: 250.00) (Inv: 250.00)																			
Chrt	InvNo	ChgSect	ChgDesc	Date	ChgAmount	ChgCurr	ChgROE	InvCurr	InvAmount	HomeROE	HomeAmount	HomeCurr	Charge Notes	Type	VatCode	VAT	CreatedBy	Created	
SIGMA01	INV000003	100	Airfreight	27/01/16	250.00	GBP	1.00	GBP	250.00	1.00	250.00	GBP	Invoice	Z	0.00	ADMIN	27/01/20		
+ SIGMA01		100	Airfreight	27/01/16	250.00	GBP	1.00	GBP	250.00	1.00	250.00	GBP	Credit Note	Z	0.00	ADMIN	27/01/20		

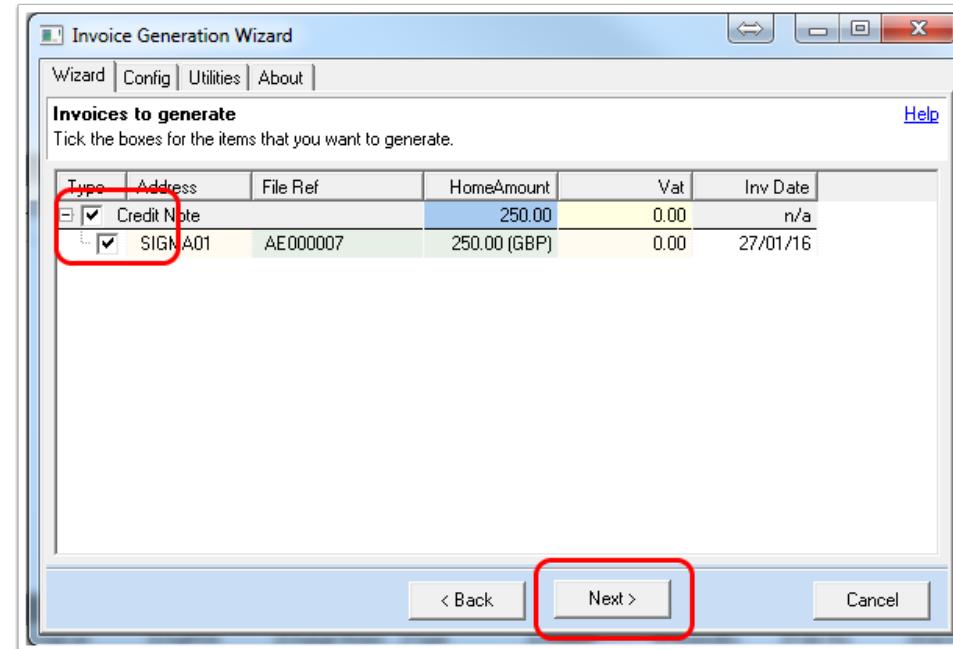
## Step #4 - Raise the Credit Note

Raising a Credit Note will use the same process as raising an Invoice.



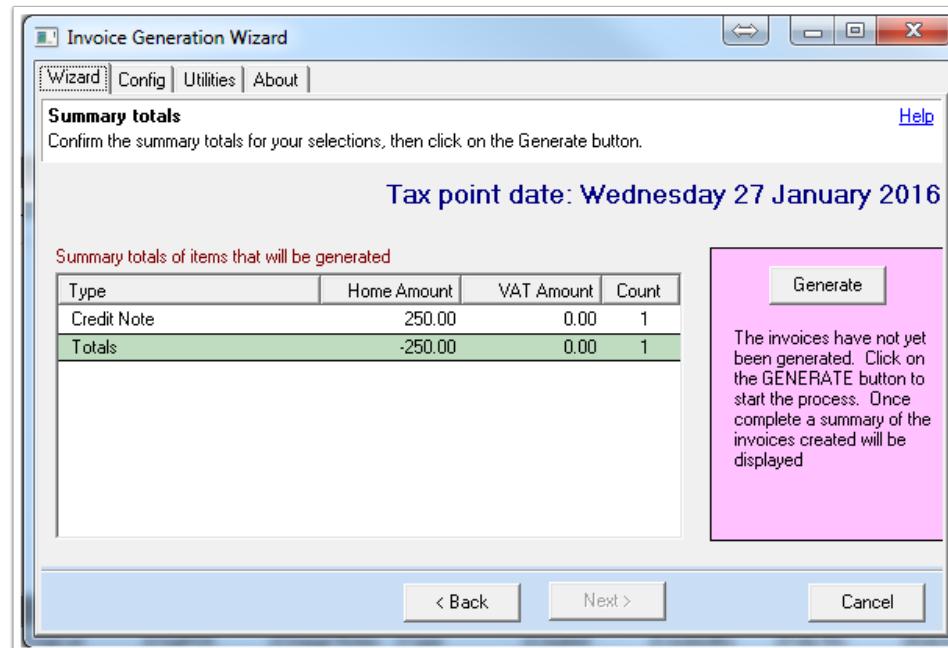
## Step #5 - Invoices to Generate

Tick the item that you wish to generate the **Credit Note** for, then click the **Next** button.



## Step #6 - Generate the Credit Note

Click the **Generate** button to create the **Credit Note**, then click **Yes** to confirm the generation.



## Step #7 - Costing Grid

The **Credit Note** should be shown on the Costing screen in pink and it should have an Credit Note number (InvNo field).

Charges   Internal Charges   All Transactions   Totals															<input checked="" type="checkbox"/> Stacked View	Batch	Unb.	
Sales = £0.00 (Chg: 0.00) (Inv: 0.00)																		
Client	InvNo	ChgCode	ChgDesc	Date	ChgAmount	ChgCurr	ChgROE	InvCurr	InvAmount	HomeROE	HomeAmount	HomeCurr	Charge Notes	Type	VatCode	VAT	CreatedBy	Created
SIGMA01	INV000003	100	Airfreight	27/01/16	250.00	GBP	1.00	GBP	250.00	1.00	250.00	GBP	Invoice	Z	0.00	ADMIN	27/01/201	
SIGMA01	CRE000002	100	Airfreight	27/01/16	250.00	GBP	1.00	GBP	250.00	1.00	250.00	GBP	Credit Note	Z	0.00	ADMIN	27/01/201	