

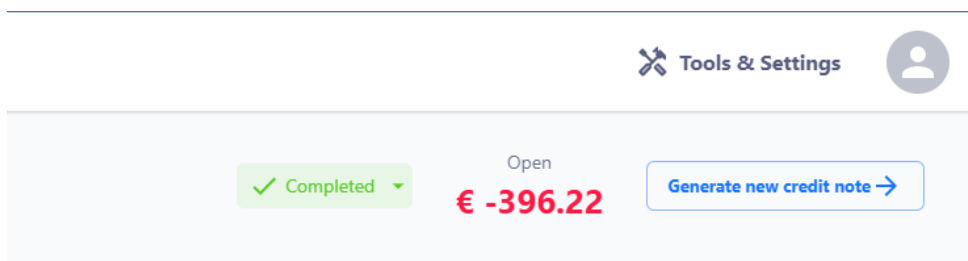
# Create Credit Notes

Credit notes in Surface Solutions are created exclusively from existing orders. A credit note can only be generated if **the outstanding amount of an [order](#) is negative**.

The outstanding amount is automatically calculated:

It results from the **sum of all order items** minus the **amounts already invoiced**. Once the outstanding amount is less than 0, the "Create Credit Note" button appears in the order editor instead of the "Create New Invoice" button.

If the amount is exactly 0, no invoicing can occur, and for a positive amount, the "Create Invoice" button is available again. In the [order editor](#), you can add or remove items to adjust the outstanding amount.



## Credit Note Editor

By clicking on "Create Credit Note," the **Credit Note Editor** opens, which in structure and functionality is identical to the Invoice Editor.

The credit note initially includes all positions from the order, but can be adjusted within the editor. The following editing options are available:

- **Edit positions:** Quantity, price, discount, and order can be modified.
- **Add or delete positions:** New positions can be added or removed without affecting the underlying order.
- **Totals, tax rates, and notes:** The credit note total, tax rate, and any notes are automatically calculated or taken from the document definition.
- **Preview:** The "Preview" button allows a temporary PDF preview of the credit note.

All text blocks, tax rates, and standard notes are derived from the document definition, which is centrally maintained per organization. The document title is automatically set to "Credit Note."

# Generation and Numbering

Once the information has been checked and confirmed, the credit note can be finally created using the "Generate Credit Note" button.

After generation:

- The credit note is **automatically linked to the original order**,
- It appears in the **invoice overview** with the **type "Credit Note"**,
- It receives its **own sequential number** from the **numbering series for credit notes** (independent of invoice numbers).

The numbering series can be configured via the [document definition](#).

Invoice.NO	Date	Customer	Creator	Status	Type	Net Amount	Gross Amount	
CN-2025-000001	04.11.2025 14:56	Coating	Mansoor Hasani	Created	Credit Note	-396.22 €	-471.50 €	<a href="#">Go to order</a> <a href="#">Export as PDF</a>

# Export and Sending

Credit notes can – just like [invoices](#) –

- be exported as PDFs,
- sent to the customer via email,
- and accessed through the invoice overview.

They are subject to the same formatting and layout rules as invoices, but differ in the document title.

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