**Credit Note in moonstride**

*Handle customer refunds, booking cancellations, or payment adjustments smoothly using the Sales Credit Note feature. Track, issue, settle, and refund with clear reporting and audit history at every step.*

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**1. Sales Credit Note Overview**

A credit note is issued to your client when a booking is cancelled, a no-show occurs, or any amount needs to be offset against future purchases. Users can manage all sales credit notes from a central list, tracking amounts and their application.

**Navigation:** CRM → Bookings → Sales Credit Note

[Insert screenshot here: Sales Credit Note list screen—with Add, Filter, Actions, and columns highlighted]

**2. How to Create a Sales Credit Note**

There are two ways to create a credit note in moonstride:

* **Option 1:** Go to **CRM → Bookings → Sales Credit Note** and click **+Add**. [Insert screenshot here: Sales Credit Note list with Add button highlighted]
* **Option 2:** From within an existing booking, go to **Invoices & Payments > Invoice** (the booking must have a paid invoice). Click the gear icon on the invoice, then select **Credit Note**. [Insert screenshot here: Invoices & Payments tab with Invoice actions and Credit Note illustrated]

**3. Searching and Filtering Credit Notes**

* Use **Filter** to display credit notes matching your search by Credit Note No., Issued By, Issued To, Type, Issue Date, Invoice Number, etc.
* Click **Search** to apply your criteria, or **Reset** to clear filters.

[Insert screenshot here: Sales Credit Note filter/search panel]

**4. Creating a Credit Note from a Booking**

When using the invoice actions menu inside a booking’s Invoices & Payments tab, select **Credit Note**. This opens a detailed creation form where you:

* Choose whether to issue the credit note to a **Customer** or **Agent**
* Decide if the note applies to a **Booking** or a specific **Invoice**
* Add items, description, select tax rate, account type, expiry date, and set the credit note amount.

[Insert screenshot here: Add/Edit Credit Note form]

Complete all required fields and click **Save**.

**5. Completing and Saving a Credit Note**

Once saved, the credit note appears in your Sales Credit Note list. Each record shows issued/settled/balance amounts, type (Refundable or Adjustable), and its status.

[Insert screenshot here: Credit Note list with new entry]

**6. Actions on a Credit Note**

Using the Actions gear icon next to each credit note, you can:

* **View:** See full credit note details and transactions. [Insert screenshot here: Actions > View option highlighted]
* **Settlement & Refund Detail:** Review all settlements, applied amounts, and refunds related to the note. [Insert screenshot here: Actions > Settlement & Refund Detail option highlighted]
* **Download Credit Note:** Download the official credit note document for your customer or records. [Insert screenshot here: Actions > Download Credit Note option]
* **Refund:** To record a refund, select "Refund" in the Actions dropdown. Complete the pop-up by choosing Refund Type (Card/Cheque/Transfer), Amount, Refund By, and Date. [Insert screenshot here: Refund dialog box with mandatory fields and Refund button]

After processing a refund, the note’s status and settled/balanced amounts will update accordingly.

* **Apply Credit Note to Future Bookings:** When a credit note is issued, any future bookings for the same customer/agent can use it as a payment method (select "credit note" in payment type). The applied amount reduces the booking balance.

**7. See Also**

* [Manage Customer Invoices & Payments](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Booking Cancellations and Refunds](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Invoice and Payment History](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

moonstride’s Credit Note feature offers flexible, auditable, customer-friendly refund and adjustment management across all bookings. Issue, track, apply, refund, and report on credit notes with complete clarity and easy in-system workflows. Use the provided screenshot placeholders for optimal visual guidance.