CA CloudDesk®

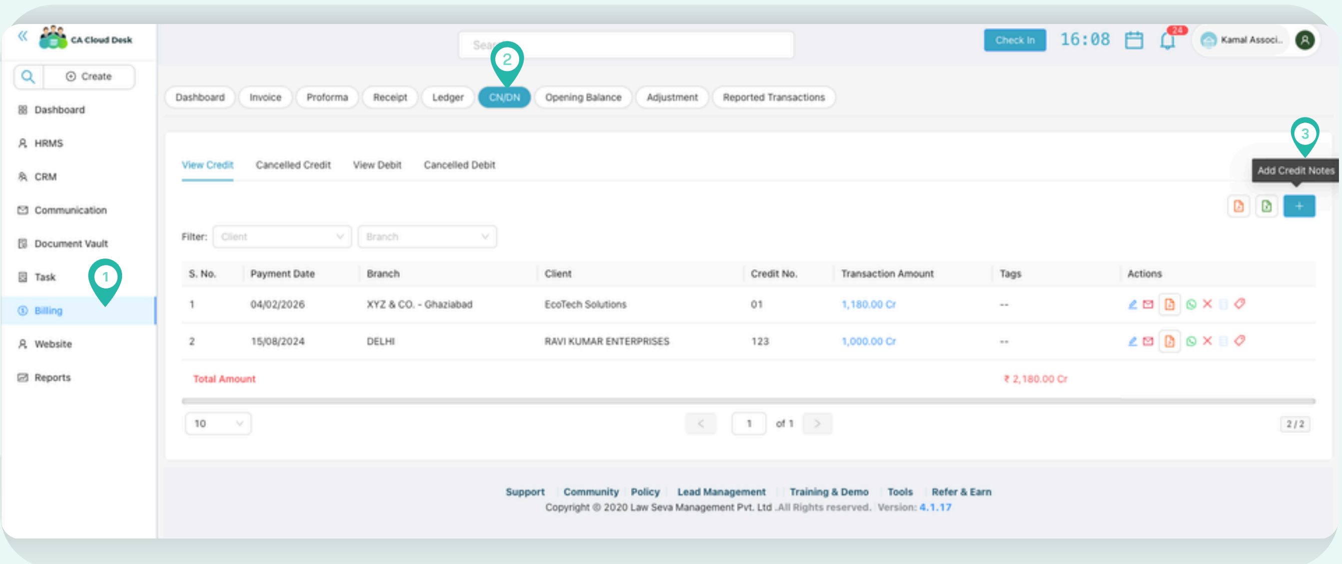
CN/DN

in CA CloudDesk

STEP 1: OPEN BILLING MODULE.

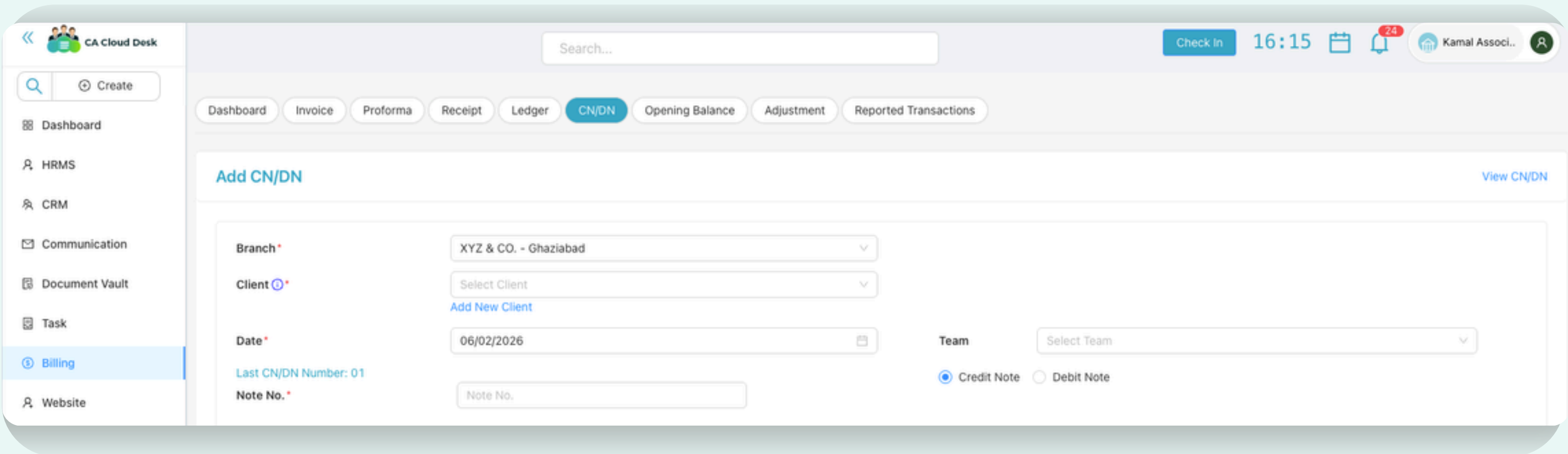
From the CA CloudDesk left navigation menu, go to BILLING and Select CN/DN to start the process.

1. Click on Billing.
2. Click on CN/DN.
3. Click on Add Credit Notes (+).



STEP 2: SELECT BASIC DETAILS

- Select the Branch
- Choose the Client (or add a new client if required)
- Select the Date
- Choose the Team (optional)
- Select the Note Type: Credit Note or Debit Note
- Enter the Note Number
- Review all details and click Save to generate the CN/DN



STEP 3: CONFIRMATION & ACTIONS

- After saving, the process is completed and a confirmation pop-up appears "Custom Invoice created successfully."
- You can then view the CN/DN, share it via Email or WhatsApp,& download it in PDF format for your records.

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