Order Invoices and Credit Memos

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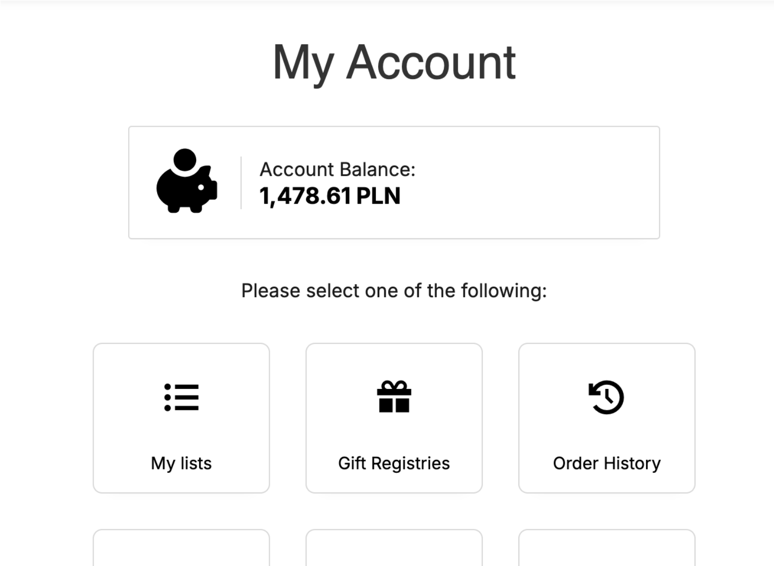
Customers can view their Business Central invoices and credit memos directly from their order history in the customer portal. This includes original invoices, credit memos (corrections/cancellations), and replacement invoices.

To view order history, navigate to **Account > Order History**.



What Customers See

- **Invoices**: Sales invoices created in Business Central for their web orders.
- **Credit Memos**: Correction documents issued when an invoice needs to be cancelled or corrected.
- **Status Tracking**: Real-time status of each document (Open, Paid, Canceled, etc.).
- **PDF Downloads**: Downloadable PDF copies of all invoices and credit memos.

Business Central Workflow (for Sellers)

Websell relies on the **Standard Invoice Correction Flow** provided by Microsoft Dynamics 365

Business Central to correct posted sales invoices and ensure all related documents remain grouped under the same web order.

You can correct or cancel an unpaid, posted sales invoice as long as it has not been fully shipped. This applies when an error is identified or when a customer requests a change before shipment is complete. In all other scenarios, a **corrective sales credit memo** should be used.

Learn more at https://learn.microsoft.com/en-us/dynamics365/business-central/sales-how-correct-cancel-sales-invoice

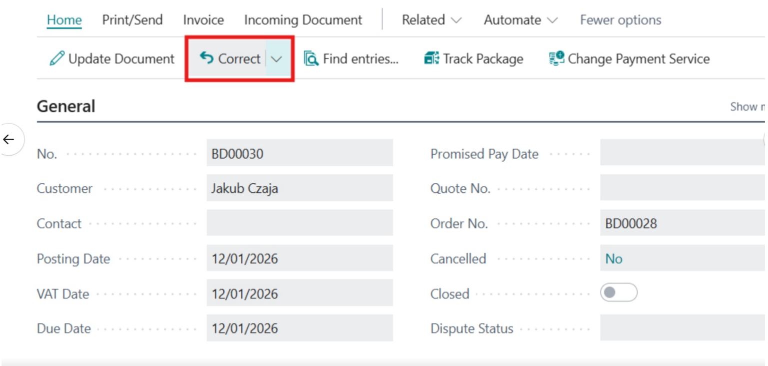
Correction Flow Process

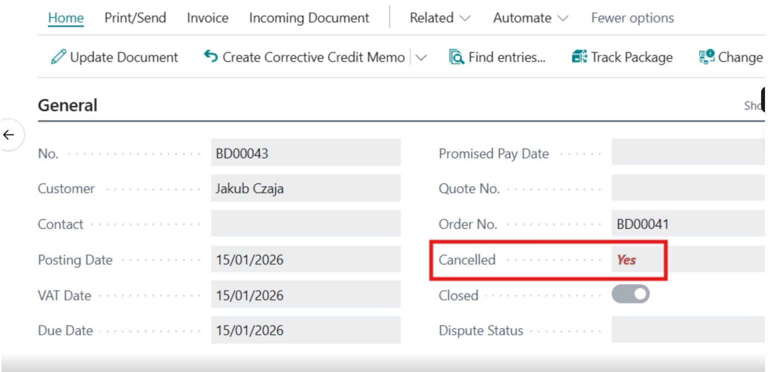
1. Import the Original Invoice.

- Import an order from the Websell e-commerce plugin.
- Verify the imported sales data.
- Post the invoice.

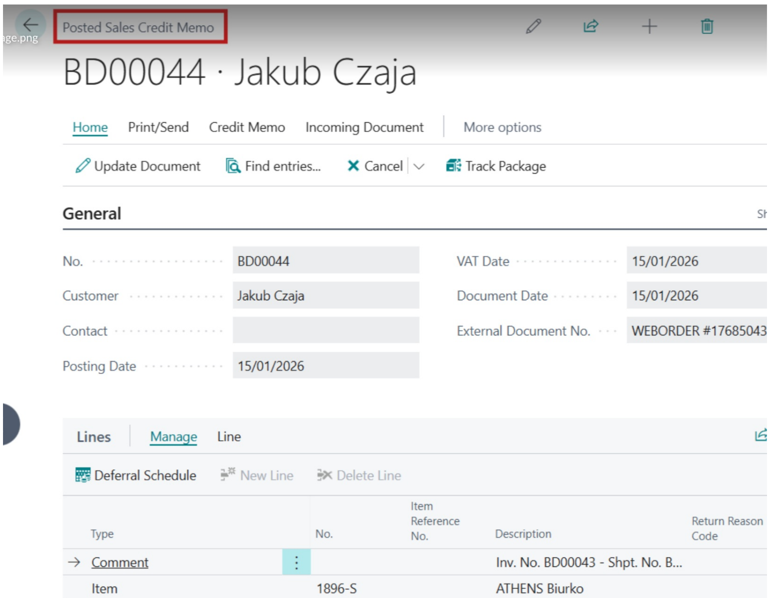
2. Issue a Credit Memo (if a correction is required).

- Open the **original posted invoice** in Business Central.
- Select one of the following actions:
  - **Create Corrective Credit Memo** (recommended), or
  - **Create Credit Memo**





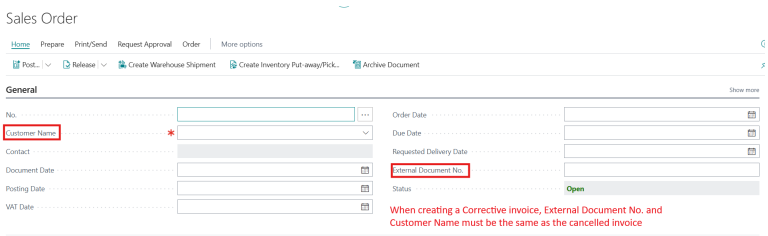
- Business Central will automatically:
  - Create a credit memo linked to the original invoice number.
- Post the credit memo.



As a result, the original invoice status changes to **Canceled** or **Corrective**.

3. Create a Replacement Invoice (if needed).

- Create a **new Sales Invoice** with the corrected details.
- Set the following fields **exactly as they were on the original invoice**
  - **External Document No.**: `WEBORDER #[OrderNumber]`
  - **Customer No.**: Must match the customer account number from the web store.
- Post the new invoice.



What Customers See After This Process

- Original invoice (marked as "Canceled" with strikethrough).
- Credit memo linked to the original (highlighted in yellow, shows negative amount).
- New replacement invoice (if created, with correct information).

All three documents will be grouped under the same order because they share the same External Document Number.