

Credit Invoice/Credit Memo

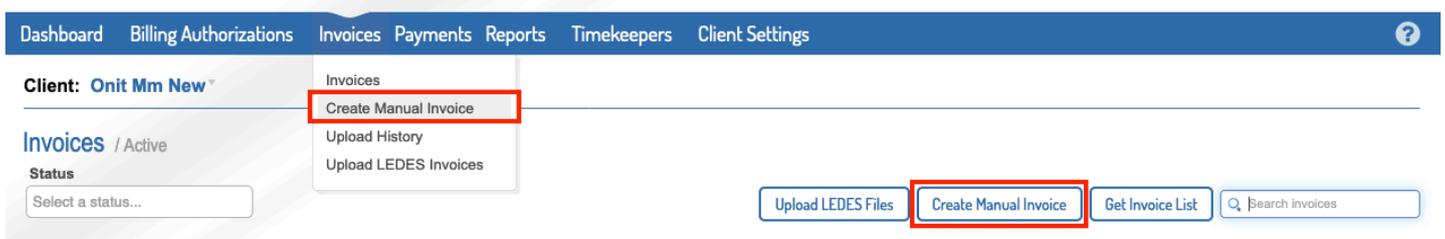
A sample credit LEDES file is available below; otherwise, you can use these instructions to build a credit invoice/credit memo directly in the system.

 [BillingPoint_Credit_Invoice_Sample.txt](#)

1. Select your client from the Client dropdown menu.



2. Choose Create Manual Invoice from the Invoices tab on the top blue bar. Or choose the Create Manual Invoice button at the top of your Invoices list.



3. Complete the required fields for the invoice header. We recommend beginning your Invoice Number with *Credit*. The project/matter you select should be the matter the credit is being applied to.

Switch Client Currently selected: Onit Mm New

New Invoice

Is this invoice subject to VAT processing rules (e.g. Does the invoice contain VAT for the EU)

Office *
 New York x v
Office of this invoice

Project *
 Select a project... v
Client Project

Date *
 2019-04-04 2019-04-18
Invoice Date: Due Date

Invoice # *

Currency *

Select Project to Populate Invoice Currency

Period *
 2019-03-01 2019-03-31
Start Date: End Date:

4. Add either 1 fee or 1 expense line (use fee if the credit is a fee credit or expense if the credit is an expense credit). List the cost as \$0 and the quantity as 1.

Fees

| Date | Timekeeper | Activity Code | Task Code | Description | Cost | Quantity | Line Total |
|------------|--------------|--------------------|----------------|-------------|------|----------|------------|
| 2018-12-01 | EMSTK... x v | A100 - Acti... x v | L120 - ... x v | credit | 0.00 | 1 | 0.00 |

Expenses

| Date | Expense Code | Description | Unit Cost | Quantity | Line Total |
|----------------------|-----------------|----------------------|----------------------|----------------------|------------|
| <input type="text"/> | Select an ... v | <input type="text"/> | <input type="text"/> | <input type="text"/> | 0.00 |

Subtotal 0.00

5. Add a discount line item for the amount of your credit (as a negative value), choose either fee discount or expense discount based on the type of line you added above. This will result in a negative invoice total for the amount of the credit.

Discounts

| Date | Discount Code | Discount Type | Description | Discount Amount |
|--------------|---------------|---------------|-------------|-----------------|
| x 2018-12-01 | DISC x | Fee x | credit | -5000 |

Add Discount

Taxes

| Date | Tax Code | Description | Tax Rate | Tax Amount |
|------|----------|-------------|----------|------------|
|------|----------|-------------|----------|------------|

Add Tax

Discount -5000.00
Tax 0.00

Net Total -5000.00

6. You can add attachments if needed using the Add Attachment button. When you are ready to submit, click Send at the bottom of the invoice, otherwise click Save As Draft until you are ready to submit it.

Attach Files

x Browse

Optional description...

Add Attachment

Send

Save As Draft

Cancel