


Credit Invoice/Credit Memo

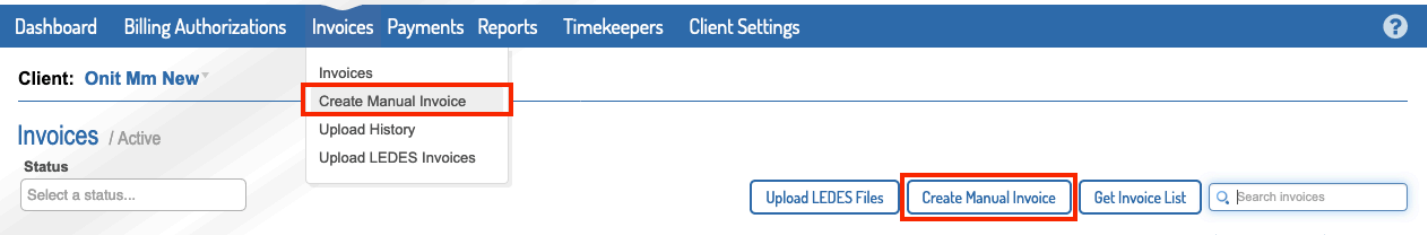
A sample credit LEDES file is available below; otherwise, you can use these instructions to build a credit invoice/ credit memo directly in the system.

 [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

Office of this invoice

Project *

Select a project...

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...	A100 - Acti...	L120 - ...	credit	0.00	1	0.00
Add Fee							

Expenses

Date	Expense Code	Description	Unit Cost	Quantity	Line Total
	Select an ...				0.00
Add Expense					
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
<button>Add Discount</button>				

Taxes

Date	Tax Code	Description	Tax Rate	Tax Amount
				<button>Add Tax</button>
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

Add Attachment

Send

Save As Draft

Cancel