

Apply Credits to New Invoices

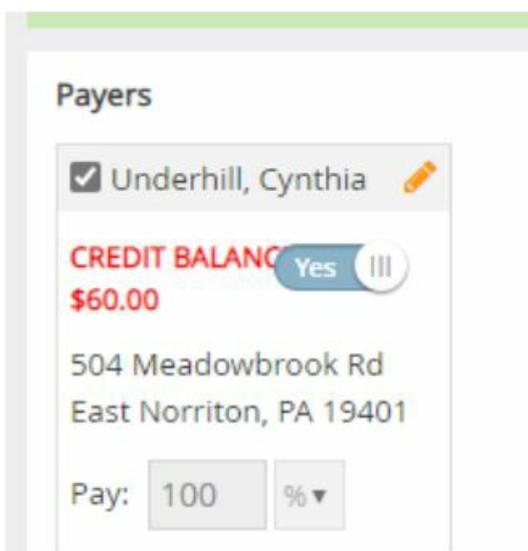
Last Modified on 03/17/2023 2:48 pm
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If a guardian has a credit on their account, you can apply it to a new invoice as you create it.

1. From the menu to the left, click **Accounting**.
2. Click **Income**. The invoices page opens.
3. Enter your Accounting PIN and click **Go**.

Note: If you do not have an Accounting PIN set, you are prompted to set one.

4. Click **New Invoice**.
5. Begin setting up the invoice as you normally would. For more information, see [Creating an Invoice](#) or [Create a Recurring Invoice](#).
6. Select the child from the drop-down under **Child**.
7. If there is a credit on the payer's account, the credit will display in the lower left corner under **Payers**. The credit is applied by default. If you do not want to apply the credit to this invoice, you must click  to remove it.



Payers

Underhill, Cynthia 

CREDIT BALANCE Yes 
\$60.00

504 Meadowbrook Rd
East Norriton, PA 19401

Pay: % 

Note: If you apply a credit to a new recurring invoice, any credits on the parent account will always be automatically applied to the next invoice.

8. When finished building the invoice, click **Preview**.
9. Click **Create** or **Create and Send**.

Note: If you apply a credit to a new invoice, it is created as a Partially Paid invoice, instead of as an Unpaid invoice. On the Invoices page, make sure you set the Status filter to include invoices that are at the Partially Paid status.