Applying credits to new invoices

If a parent 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 **Invoices**. The invoices page opens.

3. Click **New Invoice**.

4. Begin setting up the invoice as you normally would. For more information, see Creating an Invoice or Create a Recurring Invoice .

5. Click the **Select Child** drop-down menu and select the child for the invoice. If there are any credit on the parent's account, the credit displays.

Include withdrawn children?   III   No

Invoice details	Rate
* Dickens, Charles ▾	* $ 25.00

Line item notes

+Add Child

DICKENS, JOHN (Pay: 100%) ✎
CREDIT BALANCE $75.00   Yes III

jdickens@literaturefather.com

BILLING ADDRESS
123 S London Way
Sacramento
CA, 94229

6. The credit is applied by default. If you do not want to apply the credit to this invoice, you must click [ ] next to remove it.

> **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.

7. When finished building the invoice, click **Preview**.
8. 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.