Post a Credit - Miscellaneous Credit Example

The Alperi family paid last month's tuition fee in full, however, Holly missed several classes due to illness. Rather than refund the fee, the family is given a credit for future classes.
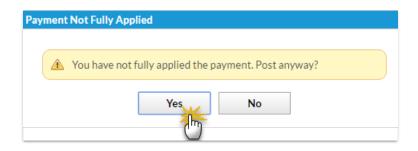
1. Locate and ensure you are viewing the correct *Family* record. Click the **Payment/Credit** button to open the *Payment/Credit Transaction Entry* page.

2. Change *Transaction Type* to **Account Credit**. *Note: It is very important that you change the payment type to make sure that the amount is not included in your revenue reports.*
   - A warning pop-up will display, *Non-monetary Transaction Types*. This is to advise you that the credit will not be included in the revenue reports including the Paid Fees report. Click **OK**.

3. Select **Class Credit** (for example) in the *Method* field, from the drop-down list. See **Customize Drop-down Lists** if you have not yet created this drop-down value.

4. Enter the **amount** in the *Payment* field (example as shown above: 55.00).

5. Click **Save Payment**.
   - If a pop-up box opens that says, *You have not fully applied this payment. Post anyway?*, click **Yes**. Unless an unpaid fee is selected to apply the payment to, the payment will be applied to the default setting in the *Transaction Settings*. Go to the *Gear (icon) > Settings > General > Tools > Edit Settings > Organization Defaults > Transaction Settings* to select one of the following: *Newest Fees First, Oldest Fees First (within the last 12 months), Oldest Fees First*.

Payment Not Fully Applied

⚠ You have not fully applied the payment. Post anyway?

[Yes]   [No]

The family's *Transactions* tab reflects the Unapplied Credit. This credit can be linked to fees posted to the account in the future. See **Jackrabbit Accounting (Linking Fees and Payments)**.

Family: Alperi

[← RETURN] [💾 SAVE CHANGES] [🗑 DELETE]

[Make Sale/Post Fees] [Payment/Credit] [Refund] [Statement]　[Add Student] [Add Contact] [Archive Family] [Family Name] [Email] [Email Schedules] [Submit Absences]　[Merge Family]

| Summary | Contacts | Classes | Events | Transactions | Billing Info | Misc | Notes (0) | Resources (0) |

[View Transaction History] [View Unapplied Credits & Unpaid Fees] (Unapplied Credits Exist in Last 12 Months)　[Help ?]

Current Balance -55.00　　Legend: Fee/Charge Payment/Credit Unpaid Fee Unapplied Credit

Last 20 (Most Recent) Transactions

View 1 - 3 of 3　　[🖨 Print] [↻ Refresh]　6 columns hidden　[⊞ Show/Hide Columns] [↺ Restore Columns]

			Date	Type	Amt	Unpaid Amt	Balance	Note	Pmt Meth	ePmt	Date Paid	Cat1	Sess	Student	Class/Event
✎	🗑	🔗		3/15/2020	Account Credit	-55.00	55.00	-55.00	Credit for classes missed due to illness	Class Credit		3/15/2020				
✎	🗑	🔗 R		2/1/2020	Payment	-110.00	0.00	0.00		Check 401		2/1/2020				
✎	🗑	🔗		2/1/2020	Tuition Fee	110.00	0.00	110.00		Check 401		2/1/2020	Dance	Spring 2020	Holly	Int Jazz - Mon - 8pm

Current Balance -55.00