Post a Credit - Fundraising Credit Example

The Harris family sold gift wrap and received a $100 credit toward tuition. They currently have a $136.88 tuition fee posted to their account.

1. Ensure you are viewing the correct family. Click the **Payment/Credit** button.

2. Change the *Pmt Type* to **Account Credit**.

3. A warning pop-up will display, *If Pmt Type value is NOT equal to 'Payment', the following reports will NOT balance: Paid Fees Summary and Revenue Summary*. This is to advise you that the payment will not be included in these reports. Click **OK**.

4. Select **Fundraiser** (for example) from the *Method* drop-down list. See **Drop-down Lists** if you have not yet created this payment method drop-down value.

5. Select one of the following:
   - Apply to Newest Fees First
   - Apply to Oldest Fees First (within last 12 months)
   - Apply to Oldest Fees First

6. Add a *Payment* amount for the credit ($100).

7. Click the **Apply Amt** field for the tuition fee(s).

8. **Save Payment.**

There was a previous balance on the account and the credit for the fundraising was split as shown. The fundraising credit is added and linked to the tuition fees. The current balance the family owes is $36.88.

Family: Harris

[← 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 (1) | Resources (0) |

| View Transaction History | View Unapplied Credits & Unpaid Fees |

Current Balance **36.88**

Legend ☐ FEE/CHARGE ☐ PAYMENT/CREDIT ☐ UNPAID FEE ☐ UNAPPLIED CREDIT

Last 20 (Most Recent) Transactions

View 1 - 20 of 20   [🖨 Print] [↻ Refresh] **9 columns hidden** [▥ Show/Hide Columns] [↺ Restore Columns]

			Date	Type	Orig Amt	Disc Amt	Amt	Balance	Date Paid	Cat1	Sess	Student	Class/Event
✏	🗑	🔗	6/25/2020	Account Credit	-100.00		-100.00	36.88	6/25/2020				
✏	🗑	🔗	6/25/2020	Tuition Fee	45.00	2.50	42.50	136.88	6/25/2020	Dance	Summer 2020	Alysha Harris	Ballet L1 - Tues 6pm
✏	🗑	🔗	6/25/2020	Tuition Fee	45.00	2.50	42.50	94.38	6/25/2020	Dance	Summer 2020	Alysha Harris	Ballet L1 - Mon 5pm