Set up Drop-down Lists for use with Account Credits

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Before adding a non-monetary credit, you'll want to update a couple of your drop-down lists, so that the credits can be reported separately from real revenue. Add new drop-down names by following the steps below.

1. Point to **Tools** and click **Edit Settings**.

2. In the left menu select **Drop-down Lists**.

3. Click **Transaction Type** in the left menu.

4. Click **Add Row**.

5. Add a new Transaction Type named *Account Credit* and set is as *Credit*.

6. **Save Changes**.

7. Click **Payment Method** in the left menu.

8. Click **Add Row** to add payment methods to define the credits. (Example: Groupon, Gift Certificate, Scholarship, Fundraiser, Class Credit, etc.)

9. After adding payment methods, **Save Changes**.

The Transaction Type: Account Credit (Credit) should never be used for monetary payments or refunds. When this Transaction Type is used, revenue is not impacted and the credit does not transfer as part of a QuickBooks export.