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 **Fee Credit - Tuition Fee**. *Note:* *It is very important that you change the payment type to make sure that the amount is not included in your revenue reports.*

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

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

6. 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 *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.
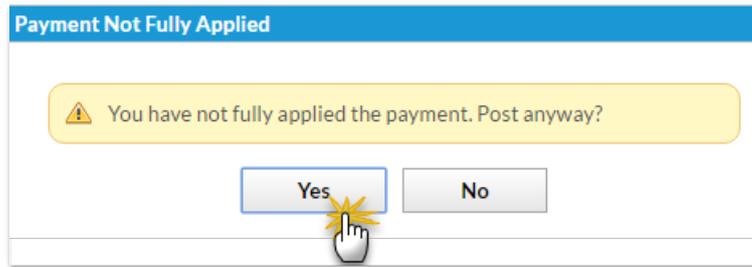
The family's *Transactions* tab reflects the Unapplied Credit. This credit can be linked to fees posted to the account in the future. See **Jackrabbit Accounting (Linking Fees and Payments)**.