Add a Credit

There may be instances when you have to add a **Credit** to a family's account. A one-time or single credit can be added as needed. The credit will reduce the amount of the family Account Balance.

Once added, the dollar amount is immediately credited to the account and can be located on the *Ledger Transactions* section of the *Transactions* tab. Credits added to the account can't be removed or modified.

A one-time **Credit** can be added to a family account at any time.
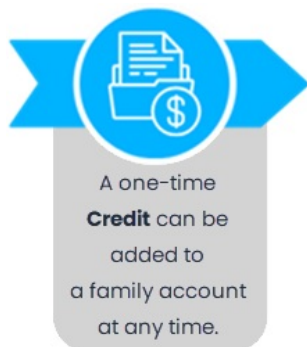
Credits are added to a single Billing Profile in a Family Account. Here are a few reasons why you might want to add a one-time credit to a family:

- A family balance needs to be adjusted for any overpayment.
- You may run a promotion and offer a one-time credit as an incentive to families.
- A child will be absent for an extended period of time and you need to adjust the family account balance.

Add a Credit

Locate the family account to add a credit.

1. Go to the **Left Menu** > **Family Accounts** or use **Search** at the top of the page to locate the family. *Note:* Be sure you have the right site selected at the top of the page.
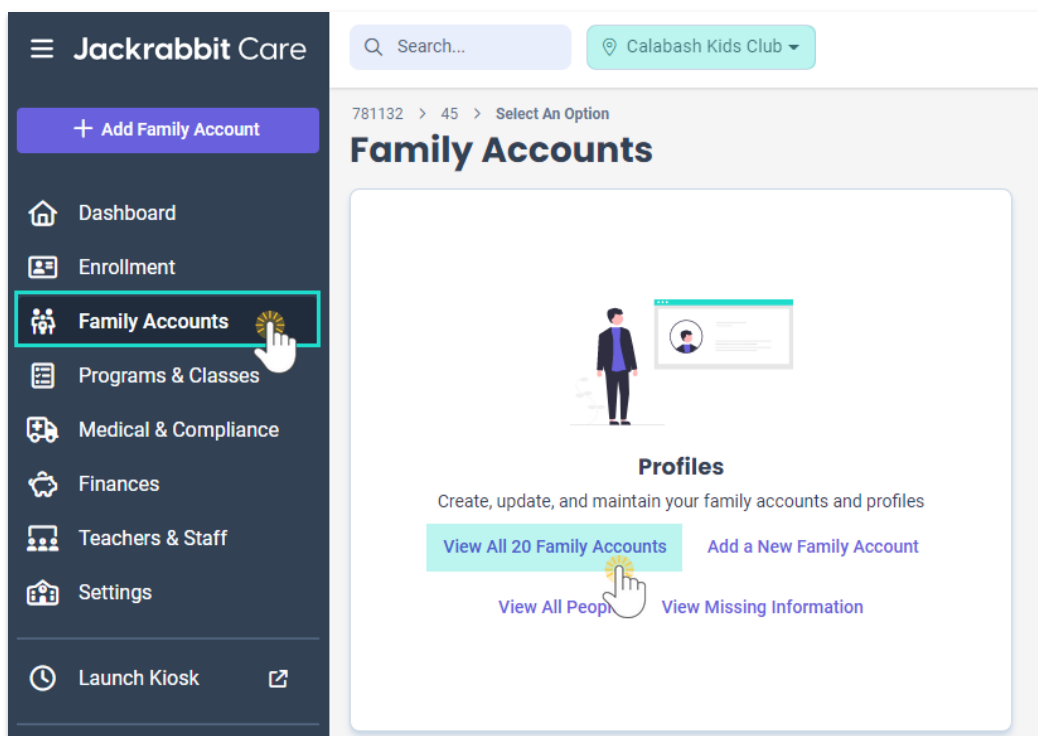
2. Click the **View All xx Family Accounts** link on the *Profiles* card to open the **Family Accounts** page.
3. Locate and click the family's card on the **Family Accounts** page.
4. Click the **Actions Menu** [Actions ▼] > **Add Credit** from any tab in the Family Account.
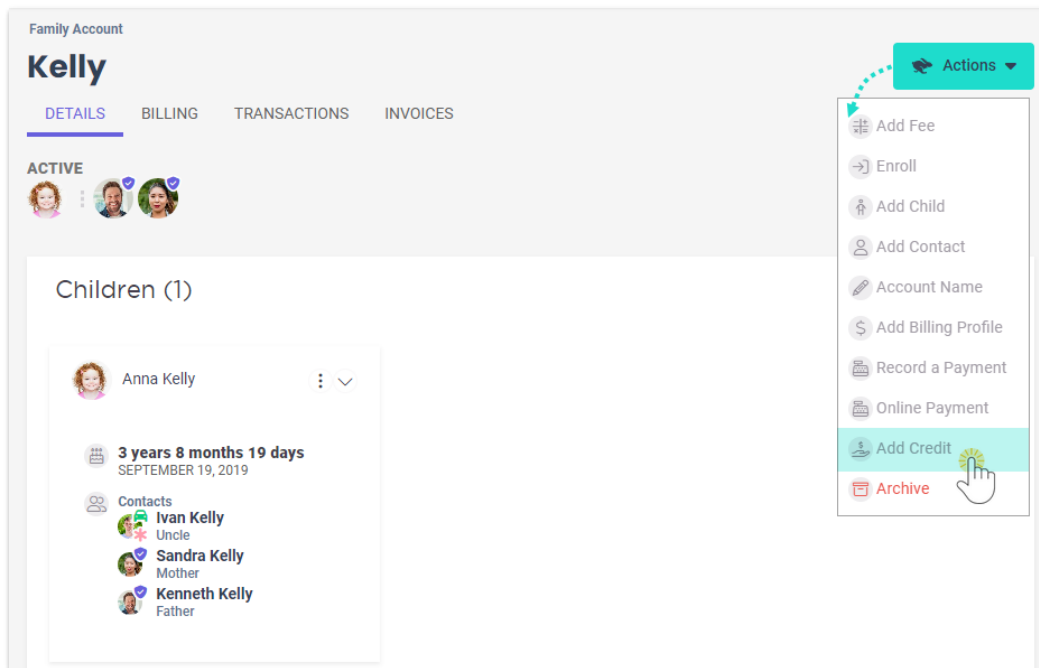
5. Enter the information in the **New Credit** window:
    - **Billing Profile** - select a Billing Profile from the drop-down list.
    - **Who is this credit for?** - select from the drop-down list.
    - **Amount** - enter the amount for the credit.
    - **Description** (optional)

6. Click **Save**. A **Credit Added** message will appear in the upper right of the page.

The one-time credit is immediately applied to the family's account and can be seen in *Transactions* tab > *Ledger Transactions* section. **Note:** this credit can't be adjusted or deleted in this section.

Ledger Transactions

$55.00 `CREDIT`

The Kelly Family was overcharged for their weekly tuition due to a clerical error.

📅 June 08, 2023 👥 Kelly 👤 Anna Kelly $ Mom Kelly

Pending Transaction Id: 1244