

Add a Credit

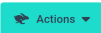
Last Modified on 12/10/2024 1:36 pm EST

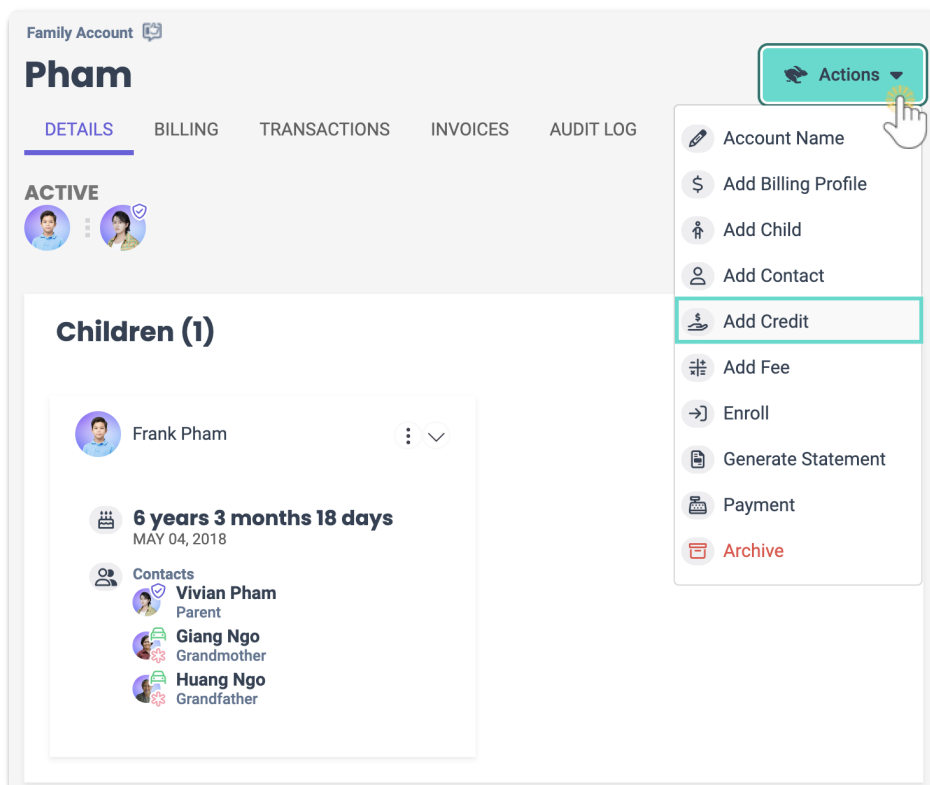
There may be times when you want to add a one-time credit to a family's account. This credit is applied to a specific Billing Profile within the Family Account and immediately reduces the overall account balance. Once the credit is added, it appears in the *Ledger Transactions* section under the Transactions tab. Once a credit is added, it cannot be removed or changed. Below are some common reasons for adding a one-time credit to a family account:

- 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, and you need to adjust the family account balance.

Add a Credit

Ensure the correct site is selected at the top of the page, then follow these steps to add a credit to a family account:

1. Go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts** and click the family's card on the Family Accounts page, or use **Search** at the top of the page to locate the family.
2. Click the **Actions** menu  > **Add Credit** from any tab in the Family Account.



3. 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)

New Credit

Billing Profile *

Weekly Billing Profile

Who is this credit for?

Franklin "Frank" Pham

Amount *

\$ 50.00

Description

Promotional summer credit

25 of 500 characters

Cancel Save

4. Click **Save**.



The one-time credit is immediately applied to the family's account and can be seen in the *Edger Transactions* section under the Transactions tab, with a credit badge **CREDIT** next to it. See [Work with a Family's Transactions](#) for more information.
