

Post a Credit - Miscellaneous Credit Example

Last Modified on 02/29/2024 6:09 pm EST

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 **Account Credit**. *Note: It is very important that you change the payment type to make sure that the amount is not included in your revenue reports.*
 - A warning pop-up will display, *Non-monetary Transaction Types*. This is to advise you that the credit will not be included in the revenue reports including the Paid Fees report. Click **OK**.
3. Select **Class Credit** (for example) in the *Method* field, from the drop-down list. See [Customize Drop-down Lists](#) if you have not yet created this drop-down value.
4. Enter the **amount** in the *Payment* field (example as shown above: 55.00).

Family: Alperi

Make Sale/Post Fees **Payment/Credit** Refund Statement Add Student Add Contact Archive Family

Summary **Contacts** Classes Events Transactions Billing Info Misc Notes (1) Resources (0) Policies (5)

Payment/Credit Transaction Entry Close

Cash, Checks, Other Credits View Transaction History

Save Payment Save & Make Another Payment

ePayments in Jackrabbit Use Card/Acct on File Use New Card

Family/Acct **Alperi** 209 Cardinal Avenue
Cornelius, NC 28031
Home Phone (999) 947-6135 Balance 0.00

Trans Date: 2/28/2024 Receipt Payment: 55.00

Transaction Type: **Account Credit** Subtype: Method: **Class Credit** Applied Amount: 0.00

Note: Chk#: Unapplied Amount: 55.00

5. 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 the *Gear (icon) > Settings > General > Organization Defaults (left menu) > 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, which is highlighted in green. This credit can

be linked to fees posted to the account in the future. See [Jackrabbit Accounting \(Linking Fees and Payments\)](#).

Summary	Contacts	Classes	Events	Transactions	Billing Info	Misc	Notes (1)	Resources (0)	Policies (5)		
View Transaction History		View Unapplied Credits & Unpaid Fees									
Current Balance -55.00		Legend <input type="checkbox"/> FEE/CHARGE <input type="checkbox"/> PAYMENT/CREDIT <input type="checkbox"/> UNPAID FEE <input type="checkbox"/> UNAPPLIED CREDIT									
View 1 - 20 of 20		Print		Refresh		13 columns hidden		Show/Hide Columns		Restore Columns	
				Date	Type	Amt	Unpaid Amt	Balance	Pmt Meth	Date Paid	
				2/28/2024	Account Credit	-55.00	55.00	-55.00	Class Credit	2/28/2024	
			R	2/10/2024	Payment	-100.00	0.00	0.00	MC	2/10/2024	
				2/1/2024	Tuition Fee	100.00	0.00	100.00	MC	2/10/2024	