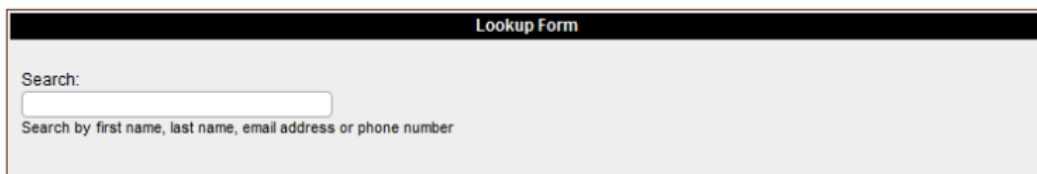


How To Guide - Entering Credits and Adjustments

Entering credits and adjustments is done by first locating the family and then accessing their account to post a transaction.

1. Go to the "**ADMINISTRATION**" tab => select "**User Accounts**"
2. Type the user's first or last name, email address or phone number into the "**Lookup Form**".



3. As you type a list of matching users will appear in a list below the entry field. You can stop typing at any time and click on a user and you will then go to the "**User Information**" screen where the user will be listed with any students they have in the system.
4. Click the "\$" icon beside their name. 
5. Specify the transaction type, "**Credit**", "**Credit Adjustment**", "**Gift**", etc. The screen defaults to "**Payment**" when it is first displayed.
 - To add to or increase the account balance you will want to select one of the "**Charges**" transaction types such as "**Order**" or "**NSF**" or a "**Charge Adjustment**". If the user account has a negative balance (balance payable) you may be posting a "**Refund**".
 - To decrease an account balance, you will select one of the "**Payments or Credits**", typically a "**Payment**" to enter payments received. Other credits include "**Credit Adjustments**" and "**Council Gifts**".
6. Enter the amount and type a note to explain what the transaction is for.
7. Click the "**Enter Transaction**" button.