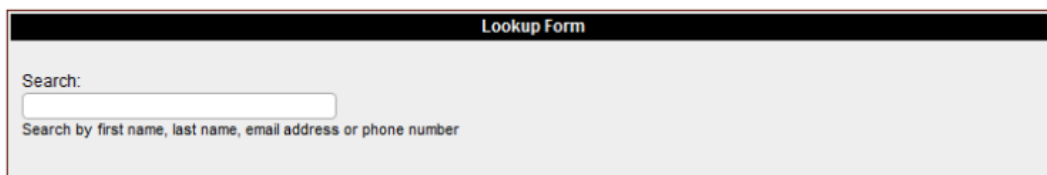


How To Guide - Transferring Credits Between Sites

If you are using the system with multiple sites you may be required to transfer a user's credit from one site to the other. This is done by first locating the family and then accessing their account on the site where they have a credit 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**".

The screenshot shows a web interface titled "Lookup Form". It features a "Search:" label followed by a text input field. Below the input field, there is a small text label that reads "Search by first name, last name, email address or phone number".

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. Enter a "**Charge Adjustment**" transaction.
6. Enter the amount to be transferred, typically the full credit balance, and type a note to explain that the balance is being transferred to another site.
7. Click the "**Enter Transaction**" button

You will then need to log into the other site and repeat the process, but this time post a "**Credit Adjustment**" for the same amount and the note should indicate that the amount is being transferred from the other site.