



Transfer a Payment between Registrations

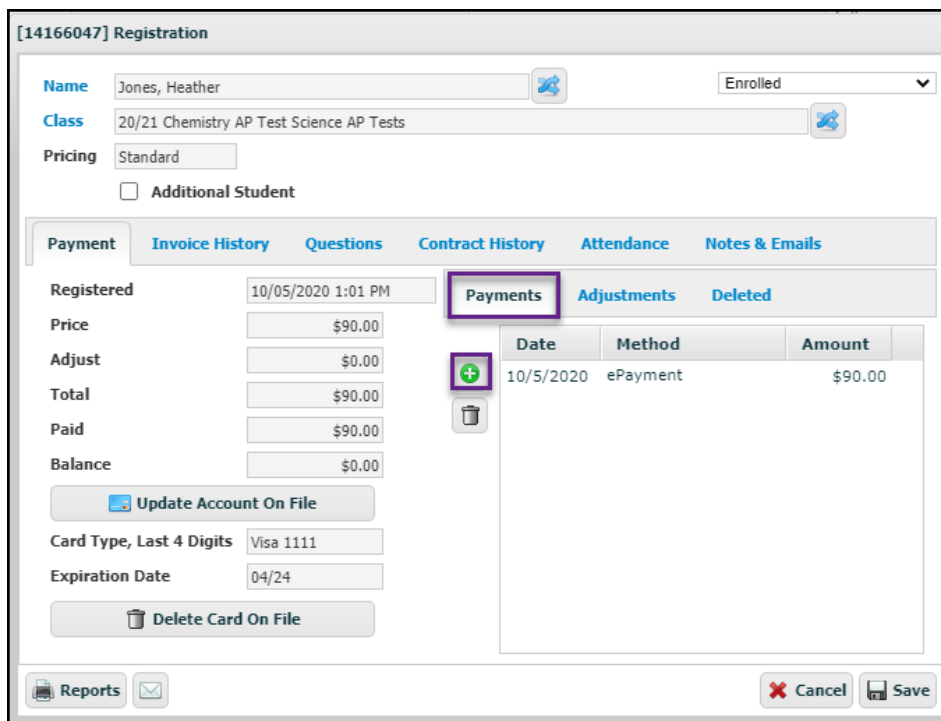
1. To transfer a payment from one registration to another, navigate into the **Registration** from which the payment will be transferred. In the **Payments** tab, locate the payment to be transferred.
2. Double click on the appropriate payment and write down the **Reference** number located in the **Reference** field. **Close** this window.

[8110837] Payment

Payment Type	ePayment
Payment Date	10/05/2020
Reference	14133003
Amount	\$90.00
Note	

Reports Email Close

3. Staying in this same Registration, add a new payment by clicking the **Add** button () on the **Payments** tab, and a **NEW Payment** window will open.



[14166047] Registration

Name: Jones, Heather Enrolled

Class: 20/21 Chemistry AP Test Science AP Tests

Pricing: Standard

☐ Additional Student

Payment Invoice History Questions Contract History Attendance Notes & Emails

Registered: 10/05/2020 1:01 PM

Price: \$90.00

Adjust: \$0.00

Total: \$90.00

Paid: \$90.00

Balance: \$0.00

Update Account On File

Card Type, Last 4 Digits: Visa 1111

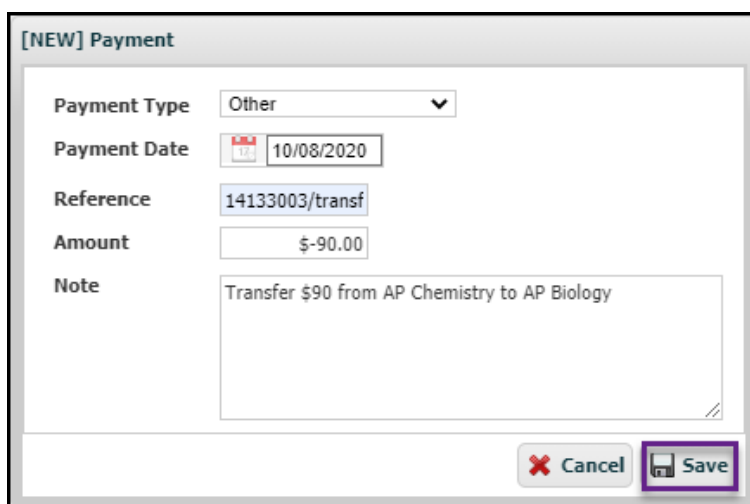
Expiration Date: 04/24

Delete Card On File

Date	Method	Amount
10/5/2020	ePayment	\$90.00

Reports Cancel Save

4. In the **NEW Payment** window, select **Other** from the **Payment Type** drop-down menu. Enter the Reference number (noted in Step #2) in the **Reference** field followed by **"/transfer."** Enter the amount of the original payment as a negative number (e.g. -90). Add a note for internal reference detailing the purpose of the transfer, noting the two classes involved in the transfer. **Save** out of this window, then Save out of the Registration.



[NEW] Payment

Payment Type: Other

Payment Date: 10/08/2020

Reference: 14133003/transf

Amount: \$-90.00

Note: Transfer \$90 from AP Chemistry to AP Biology

Cancel Save

5. Navigate to the Registration to which the payment will be transferred. Double click on the appropriate Registration, and a **Registration** window will open.

[345303] Class

Class Number: 20/21 Biology AP Test Status: Active

Program: AP Testing Enrolled: 5

Course: Science AP Tests Waitlist: 0

Conf. Email:

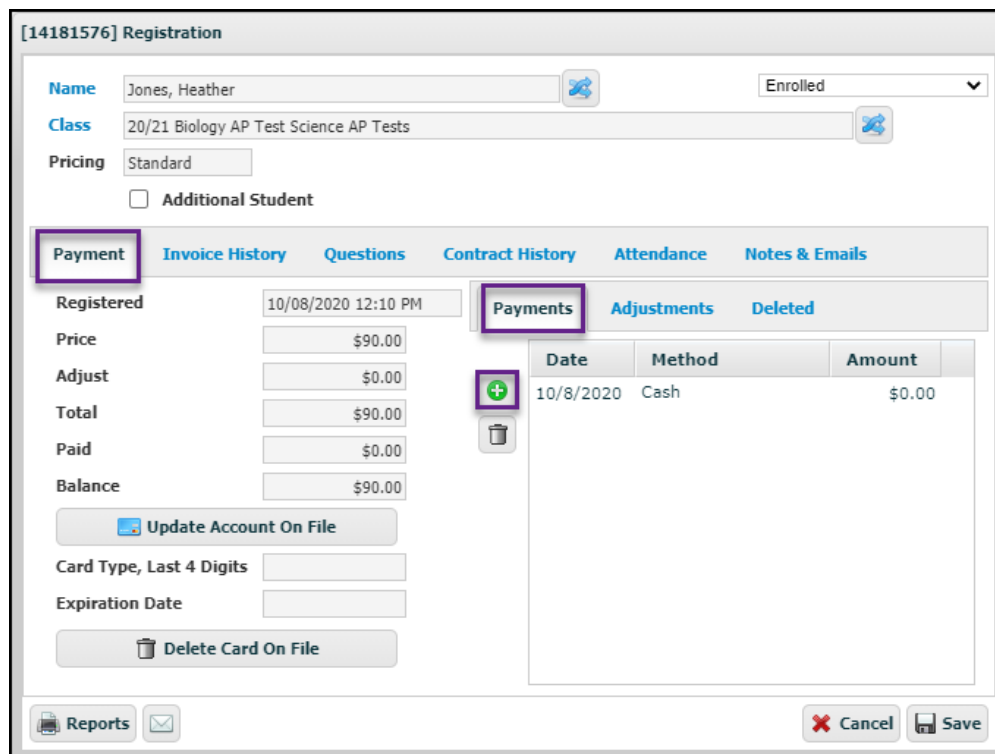
General Instructor & Expenses Schedule Arrangements **Registration** Waitlist Receipt Invoice

Registrations Registration Email

	Date	Name	Status	Reference	Method	Paid	Balance
	10/5/2020	Jones, Blake	Enrolled	14133004	ePayment	\$90.00	\$0.00
	10/8/2020	Jones, Heather	Enrolled		Cash	\$0.00	\$90.00
	10/1/2020	Koster, Alec	Enrolled	15946082	ePayment	\$90.00	\$0.00
	9/29/2020	Moeller, Sally	Enrolled	15162	Check	\$90.00	\$0.00
	8/25/2020	Theis, Decker	Enrolled	15946077	ePayment	\$90.00	\$0.00

Reports Cancel Save

6. Add a new payment in the **Payment** tab by clicking the **Add** button () , and a **NEW Payment** window will open.



[14181576] Registration

Name: Jones, Heather Enrolled

Class: 20/21 Biology AP Test Science AP Tests

Pricing: Standard

☐ Additional Student

Payment Invoice History Questions Contract History Attendance Notes & Emails

Registered: 10/08/2020 12:10 PM

Price: \$90.00

Adjust: \$0.00

Total: \$90.00

Paid: \$0.00

Balance: \$90.00

Update Account On File

Card Type, Last 4 Digits:

Expiration Date:

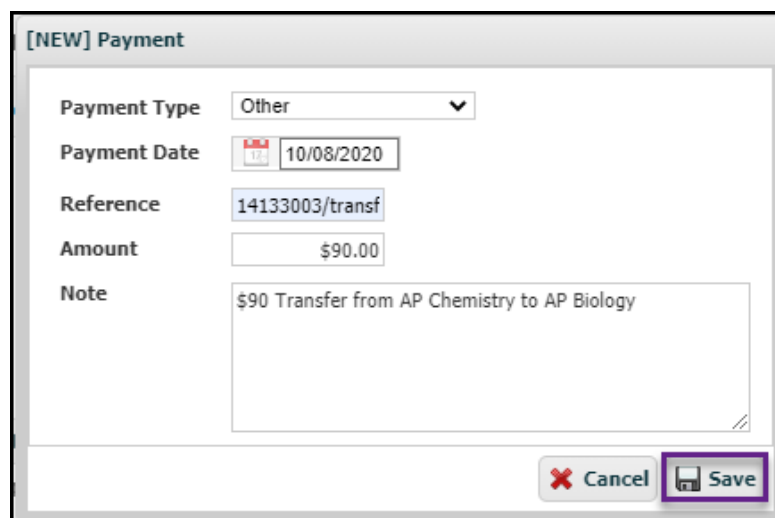
Delete Card On File

Payments Adjustments Deleted

Date	Method	Amount
10/8/2020	Cash	\$0.00

Cancel Save

7. In the **NEW Payment** window, select **Other** from the **Payment Type** drop-down menu. Enter the original payment's Reference number (noted in Step #2) in the **Reference** field followed by **"/transfer."** Enter the amount of the original payment as a positive number (e.g. 90). Add a note for internal reference detailing the purpose of the transfer, noting the two classes involved with the transfer. **Save** out of this window, then save out of the Registration.



[NEW] Payment

Payment Type: Other

Payment Date: 10/08/2020

Reference: 14133003/transf

Amount: \$90.00

Note: \$90 Transfer from AP Chemistry to AP Biology

Cancel Save