



# Enter a Payment or an Adjustment

## Entering a Payment:

1. Double-click into the **Class** in which the participant is registered. Select the **Registrations** tab.

[345481] Class

Class Number: 20/21 Middle School Flag Football      Status: Active

Program: Athletics      Enrolled: 1

Course: Middle School Football      Waitlist: 0

Conf. Email: [Empty]

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

Registrations    Registration Email

Date	Name	Status	Reference	Method	Paid	Balance
8/7/2020	Moeller, Peter	Enrolled	26120	Check	\$50.00	\$62.00

2. Find the participant in the list of registered names, and double-click on the participant's name. A **Registration** window will open.
3. In the **Registration** window and on the **Payment** tab, click the **green plus button**.

[13905166] Registration

Name: Moeller, Peter      Enrolled

Class: 20/21 Middle School Flag Football Middle School Football

Pricing: Standard

Additional Student

**Payment**    Invoice History    Questions    Contract History    Attendance    Notes & Emails

Registered: 08/07/2020 9:46 AM      Payments    Adjustments    Deleted

Price	\$100.00
Adjust	\$12.00
Total	\$112.00
Paid	\$50.00
Balance	\$62.00

Date	Method	Amount
8/7/2020	Check	\$50.00

4. The **NEW Payment** window will open. Select the payment method from the **Payment Type** drop-down.

[NEW] Payment

Payment Type -- Select One -- ▲ This field is required.

Payment Date

Reference

Amount

Note

Cancel Save

[NEW] Payment

Payment Type -- Select One -- ▲

Payment Date 09/17/2020

Reference

Amount \$0.00

Note

Cancel Save

- Enter the date in which the payment is processed in the **Payment Date** field.
  - **NOTE:** This field defaults to the current date. Admin/Users may backdate for any payment type except a credit/debit card or eCheck, to reflect when payments were noted or received.
- Enter the reference number (e.g. check, receipt number) into the **Reference** field.
  - **NOTE:** When processing payment with a credit/debit card or eCheck, leave this field blank.
- Enter the payment amount into the **Amount** field.
  - Enter comments as needed in the **Note** field. These comments are for internal use only, and do not print on receipts.

- When processing a payment with either **Credit/Debit Card** or **eCheck**, click the **Process Payment Now** button that will populate next to the **Amount** field. If the payment completed successfully, a confirmation message is sent to Admin/Users, and the payment reference number autofills the **Reference** field.
  - When processing payment types outside of credit card/debit card and eCheck, just click **Save** once all other fields have been completed.
5. **Save** before closing **Registration** window, to ensure that the system accurately records these entries.

### Entering an Adjustment:

1. Double-click into the **Class** in which the participant is registered. Select the **Registrations** tab.
2. Find the person in the list of registered participants and double-click on the person's name.
3. In the **Registration** window, navigate to the **Payment** tab and click into the **Adjustments** tab. Then select the green **Plus** button next to the **Adjustments** window.

[13905166] Registration

Name: Moeller, Peter    Enrolled

Class: 20/21 Middle School Flag Football Middle School Football

Pricing: Standard

Additional Student

Payment    Invoice History    Questions    Contract History    Attendance    Notes & Emails

Registered	08/07/2020 9:46 AM	Payments	Adjustments	Deleted
Price	\$100.00			
Adjust	\$12.00			
Total	\$112.00			
Paid	\$50.00			
Balance	\$62.00			

Date	Reason	Amount
8/7/2020	t-shirt: Yes	\$12.00

4. The **NEW Adjustment** window will open.

[NEW] Adjustment

Date \* 09/17/2020  Show On Invoice

Amount \$15.00

Reason \* T-shirt purchase

Cancel Save

- Select the **Date** for this adjustment.
- Next, enter adjustment **Amount**.
  - When charging the registrant an additional amount, enter a positive number (e.g. \$15).
  - When reducing the amount of the student's balance, enter a negative number (e.g. -\$15).
- Enter comments in **Reason** field. The comments are for internal purposes and will not appear on receipts.
- For Childcare/Contract classes, Check the **Show On Invoice** box to include this adjustment on a future invoice. This may be done either as the adjustment is recorded, or after the adjustment has been saved.
- **Save** once entries are complete.