How to Credit and Debit Member Profile Accounts

Actions · https://a2bmanager.com/docs/how-to-credit-and-debit-member-profile-accounts/

Embedded media: https://a2bmanager.com/wp-content/uploads/2026/10/credit-debit-walkthrough.mp4

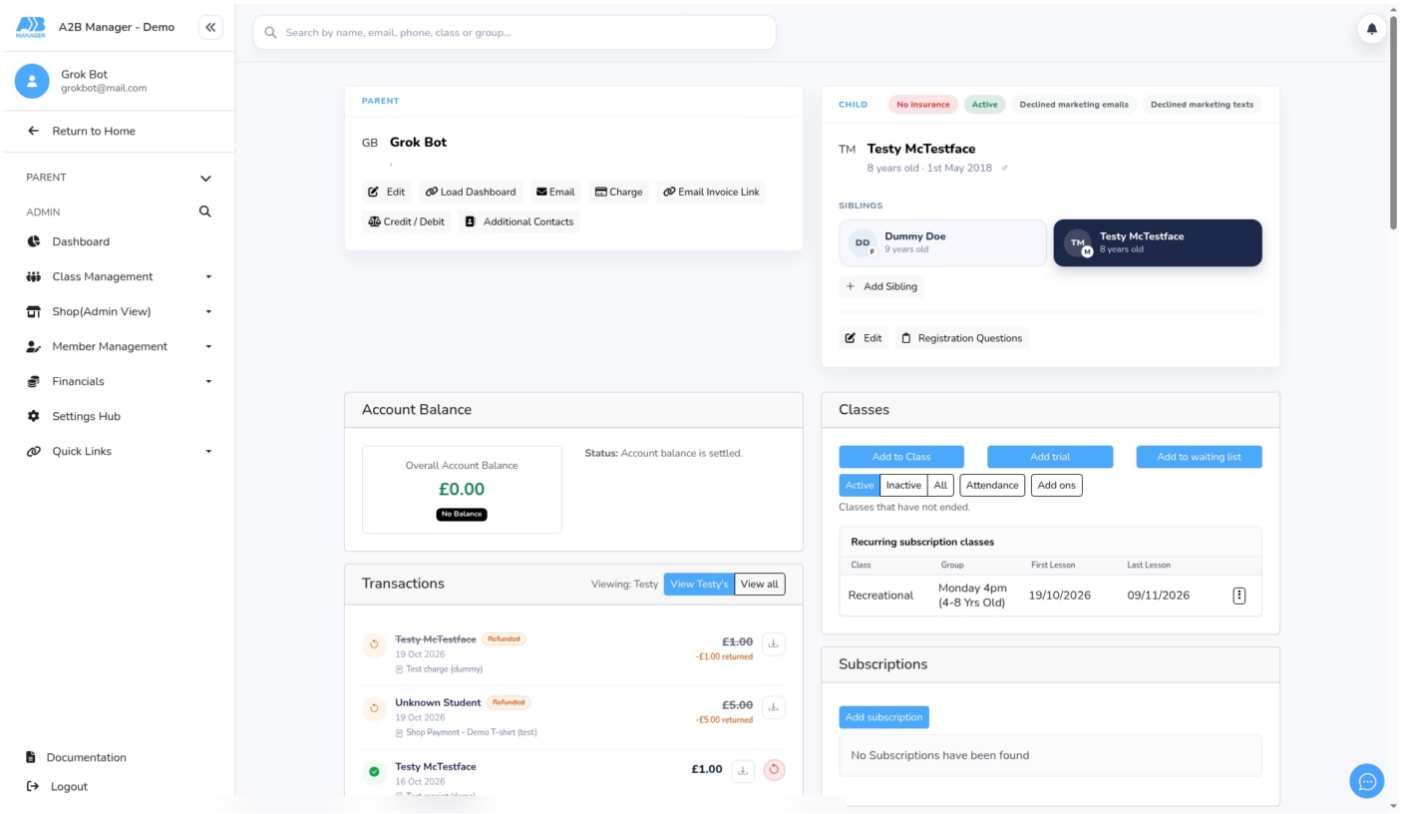
Video walkthrough: adding a £1 credit to a member's account and reversing it

You can add credit to a family's account balance, or take a debit from it, straight from a member's profile. The balance belongs to the parent's account, so it's shared by all their children. Credit is taken off the family's next invoice automatically, and a debit is added to it.

Adding credit to a member's account

Step 1: Open the member's profile (0:00)

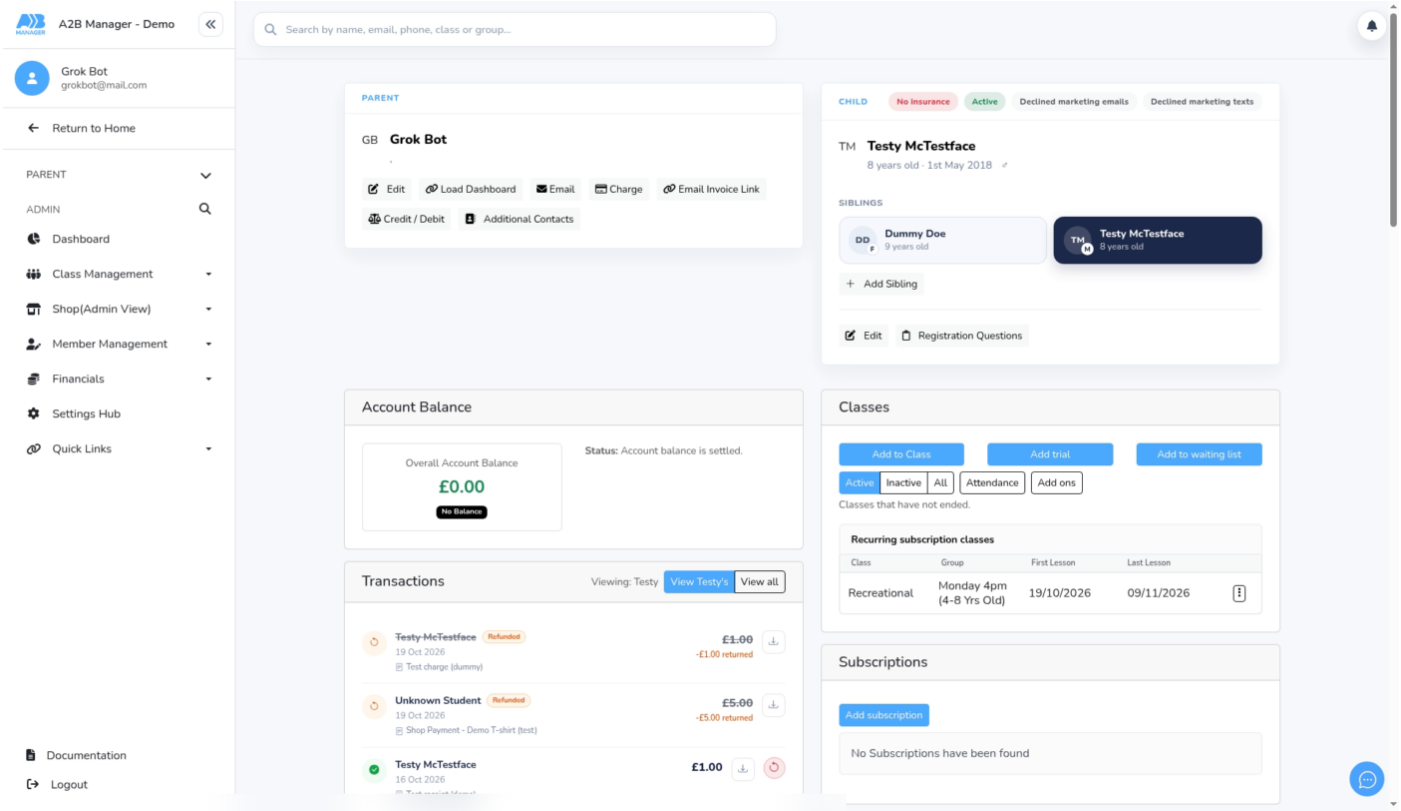
- Find the member and open their profile.
- The **Account Balance** card shows the family's current balance, for example **£0.00 No Balance**.



Step 1: The Account Balance card on the profile

Step 2: Click Credit / Debit (0:06)

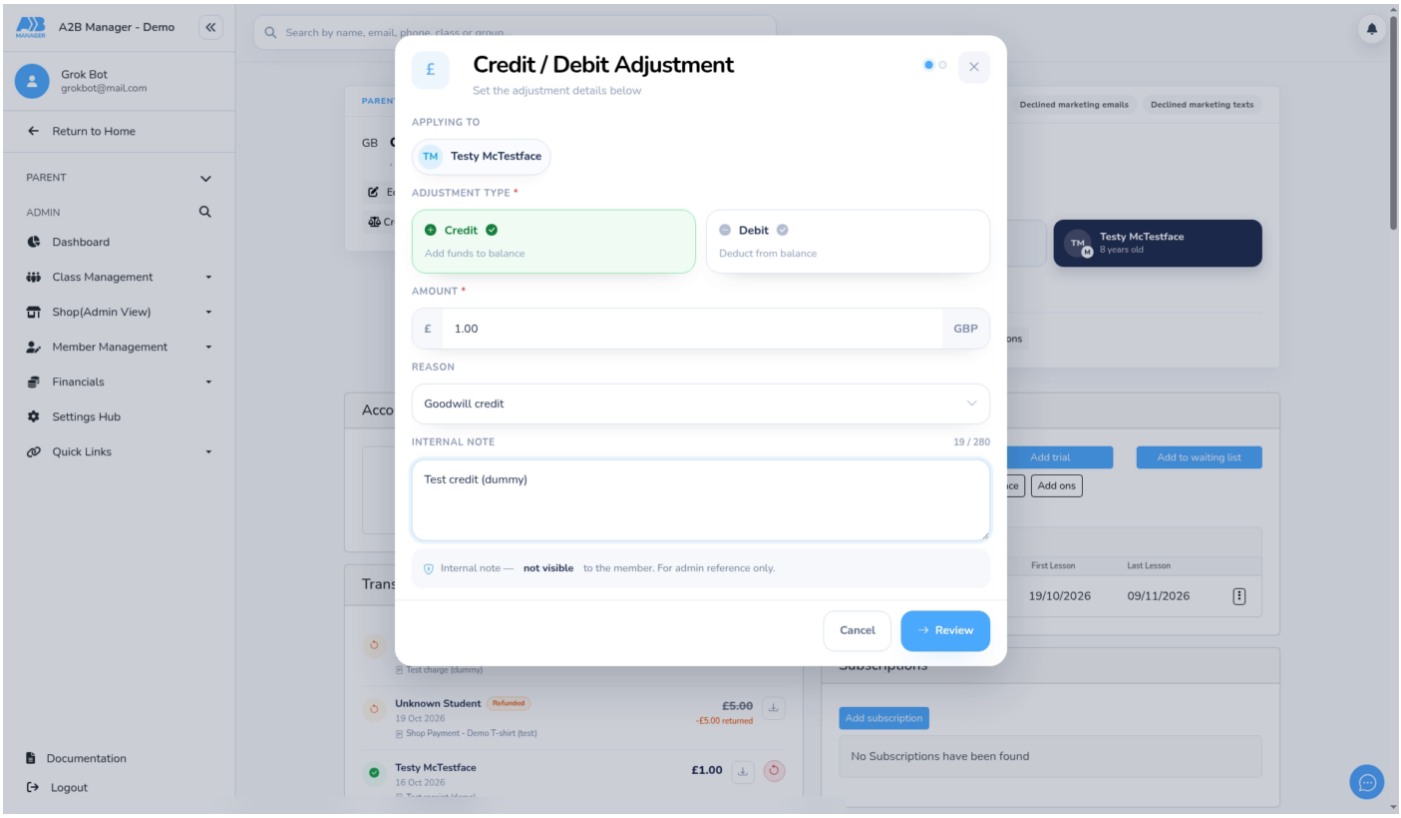
- Click **Credit / Debit** at the top of the profile. The Credit / Debit Adjustment window opens.
- You can also tick members on a list, then choose **Credit / Debit** from the **Action** menu.



Step 2: The Credit / Debit button

Step 3: Enter the adjustment (0:09)

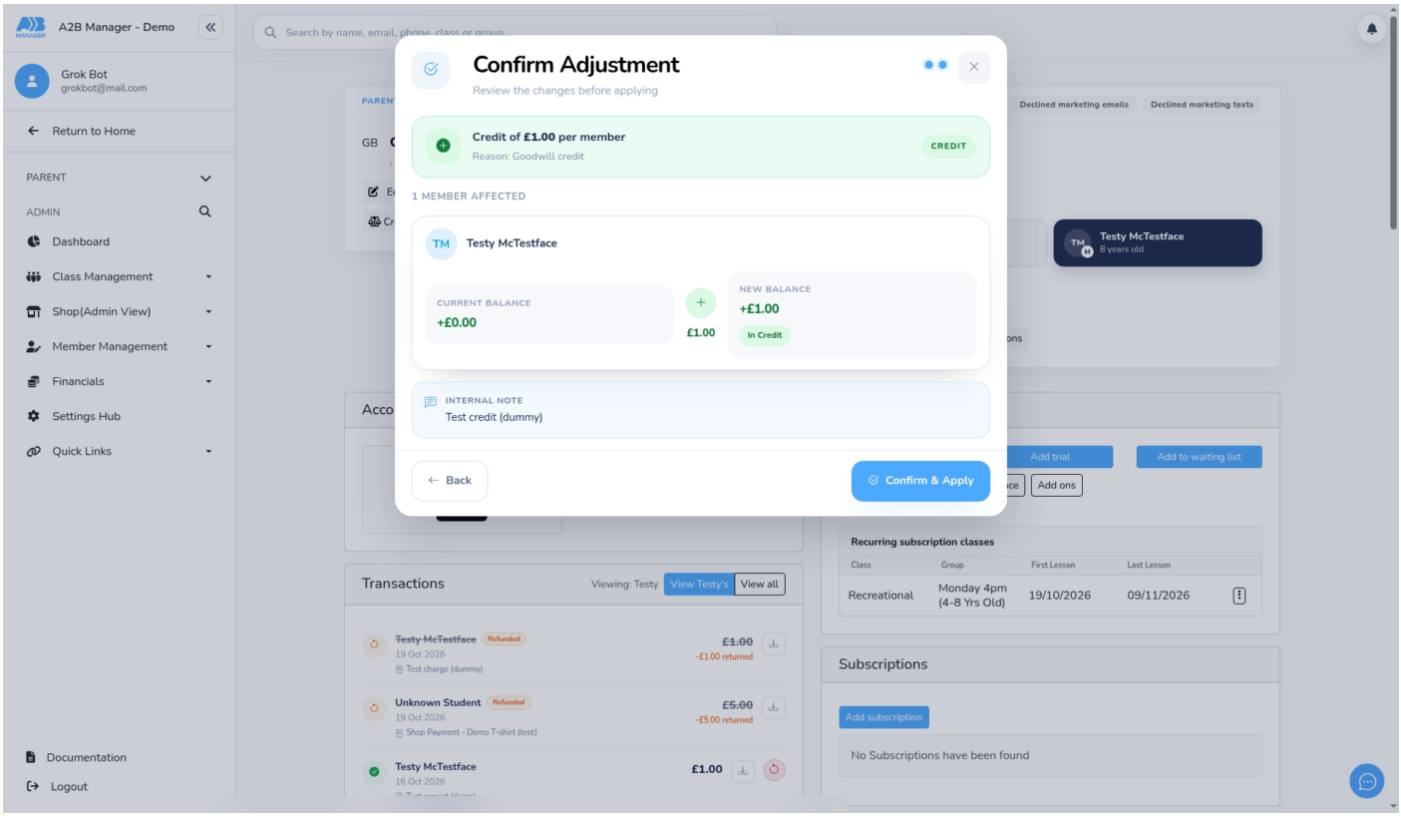
- Check **Applying to** shows the right member.
- Choose **Credit** to add funds to the balance, or **Debit** to take funds from it.
- Enter the **Amount** in pounds.
- Pick a **Reason** from the list if you like, for example **Goodwill credit**. It's optional.
- Add a note for your records if you need to. Keep it factual.



Step 3: A £1.00 Goodwill credit filled in

Step 4: Review the adjustment (0:41)

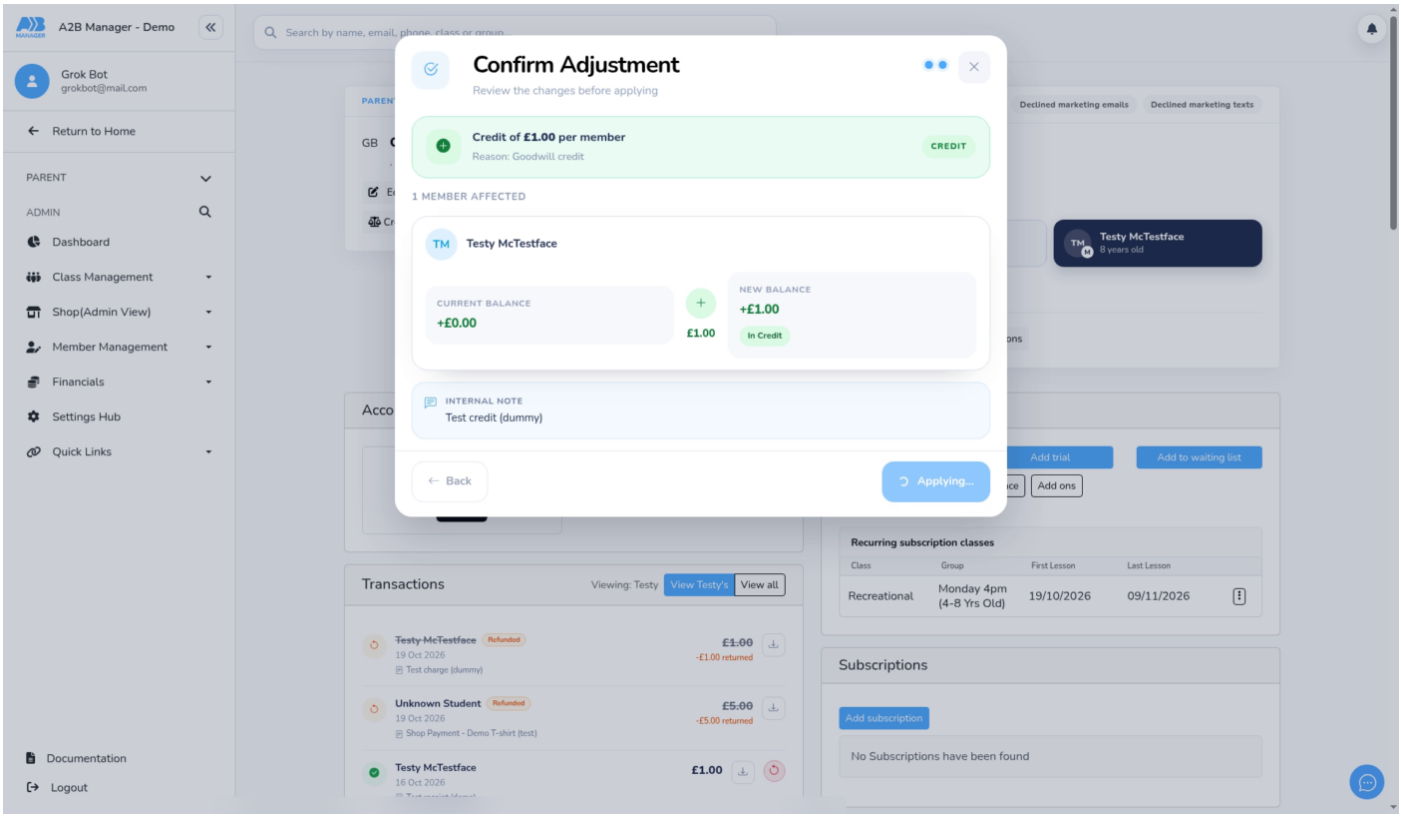
- Click **Review**.
- Check the summary: the member, the current balance and the new balance.



Step 4: The Confirm Adjustment screen

Step 5: Confirm and apply (0:49)

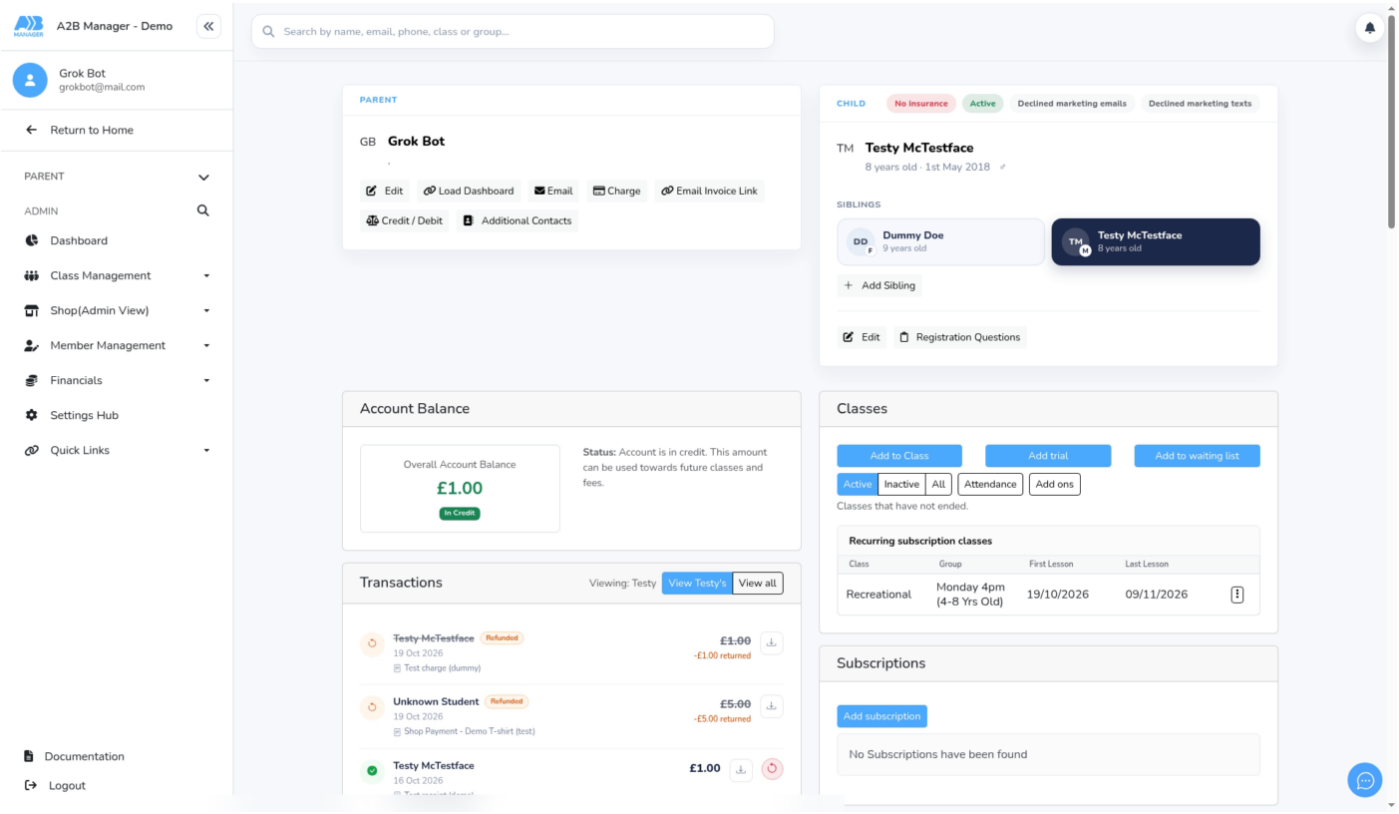
- Click **Confirm & Apply**. The window closes and the profile reloads.
- To change something first, click **Back**.



Step 5: Confirm & Apply

Step 6: Check the new balance (0:56)

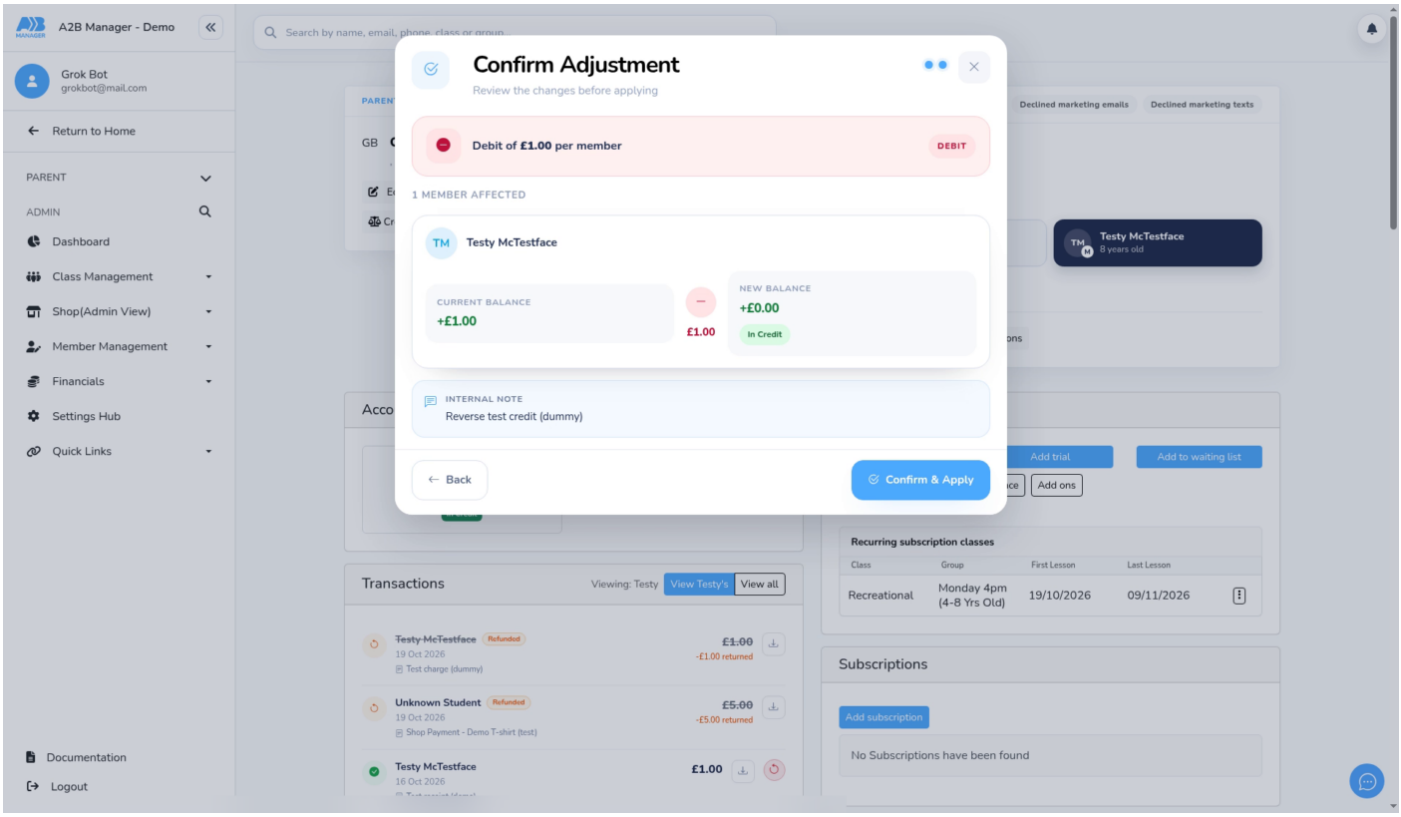
- The Account Balance card now shows the new amount, for example **£1.00 In Credit**.
- The credit comes off the family's next invoice automatically.



Step 6: The balance now shows £1.00 In Credit

Step 7: Reverse an adjustment (1:04)

- You can't delete an adjustment. To reverse one, apply the opposite: for a £1 credit, apply a £1 debit.
- Click **Credit / Debit**, choose **Debit**, enter the same amount, then **Review** and **Confirm & Apply**.
- The balance goes back to where it was (here, **£0.00 No Balance**).



Step 7: Reviewing the reversing debit

Good to know

- The balance is on the parent's account, so brothers and sisters share it.
- Credit is used on the family's next invoice automatically. You don't need to do anything else.
- A debit is added to the family's next invoice.
- Parents aren't emailed about an adjustment.
- Each adjustment stays in the balance history, and is recorded in the activity log.

> **Tip:** Adjusting several members at once? Select only one child per family. The balance is shared, so ticking two brothers or sisters applies the amount twice to the same family.

FAQs

- **How does the family use their credit?** It's taken off their next invoice automatically. You can also apply it to an outstanding invoice.
- **Can I undo an adjustment?** Not directly. Apply the opposite adjustment for the same amount.
- **Do I have to pick a reason?** No, it's optional.

Download the PDF guide (optional)