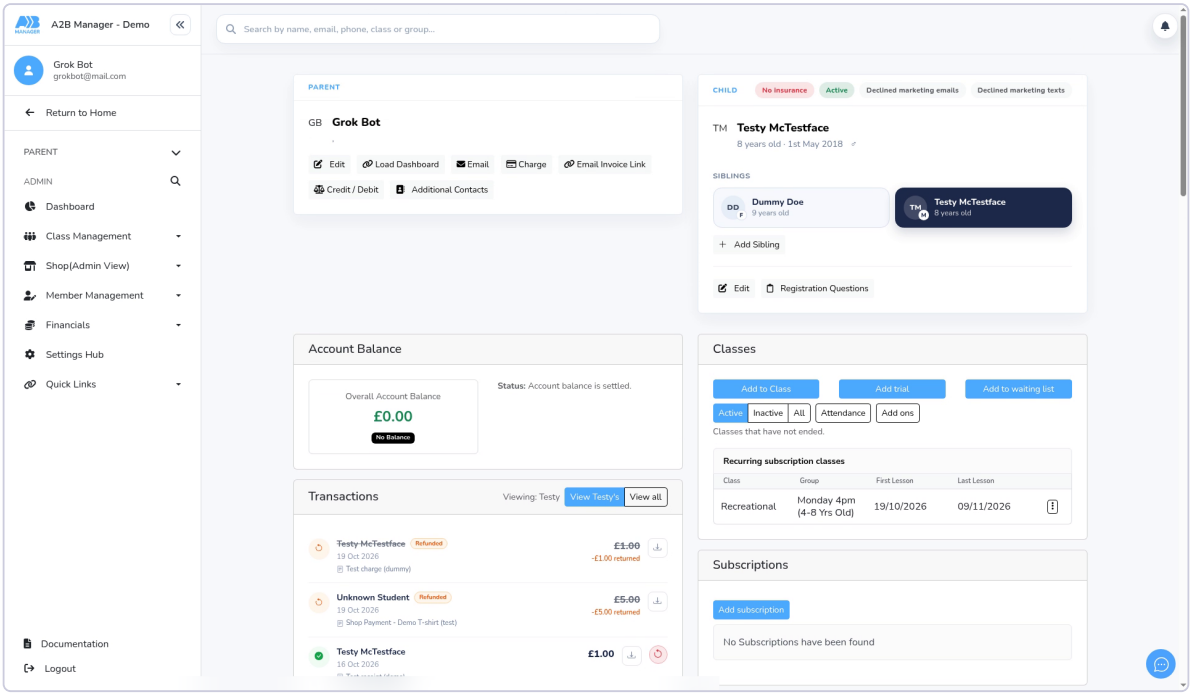
How to Credit and Debit Member Profile Accounts

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

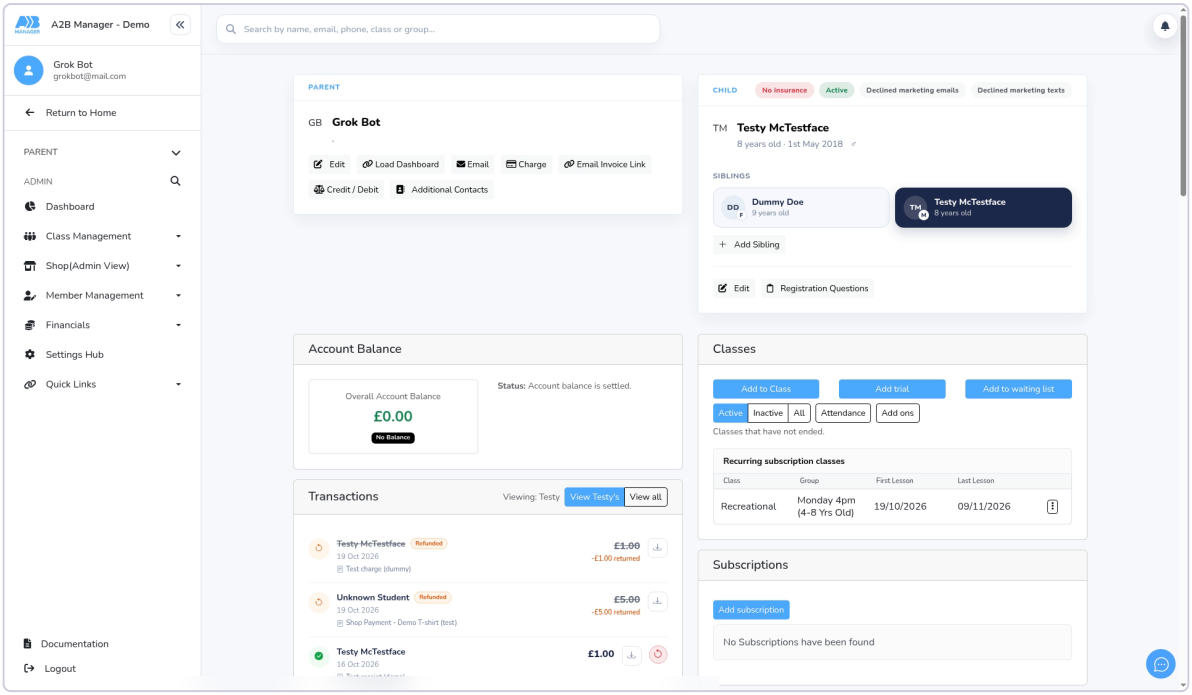
1. Open the member's profile (0:00)

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



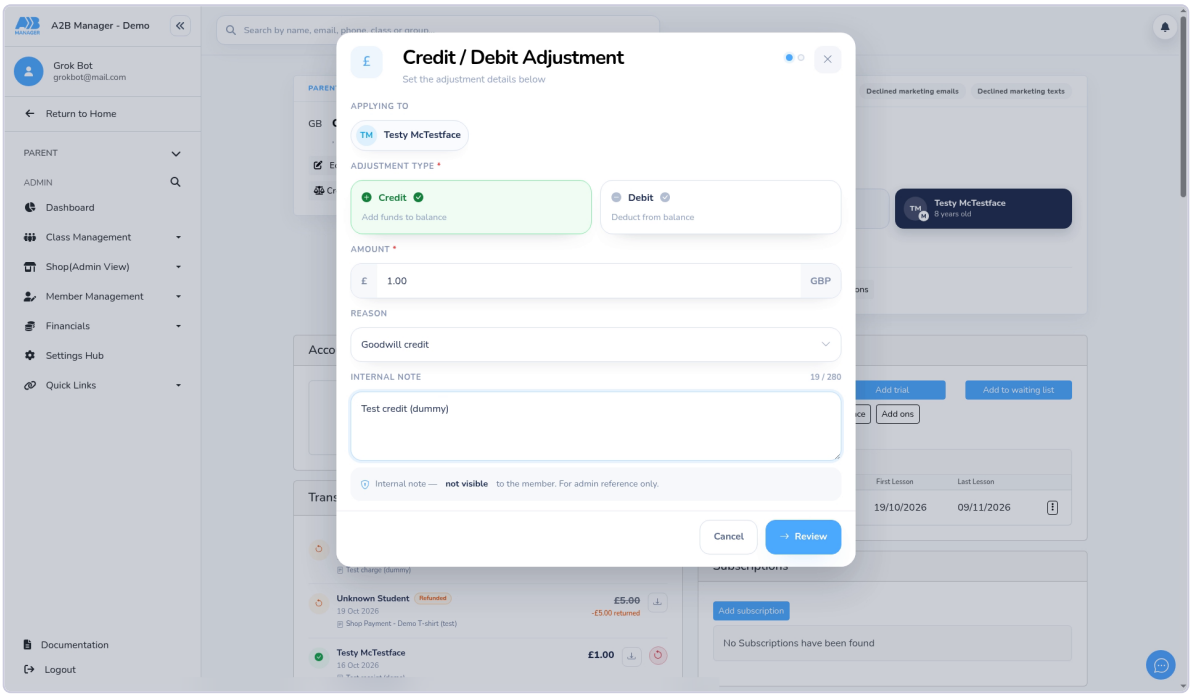
2. Click Credit / Debit (0:06)

- 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.



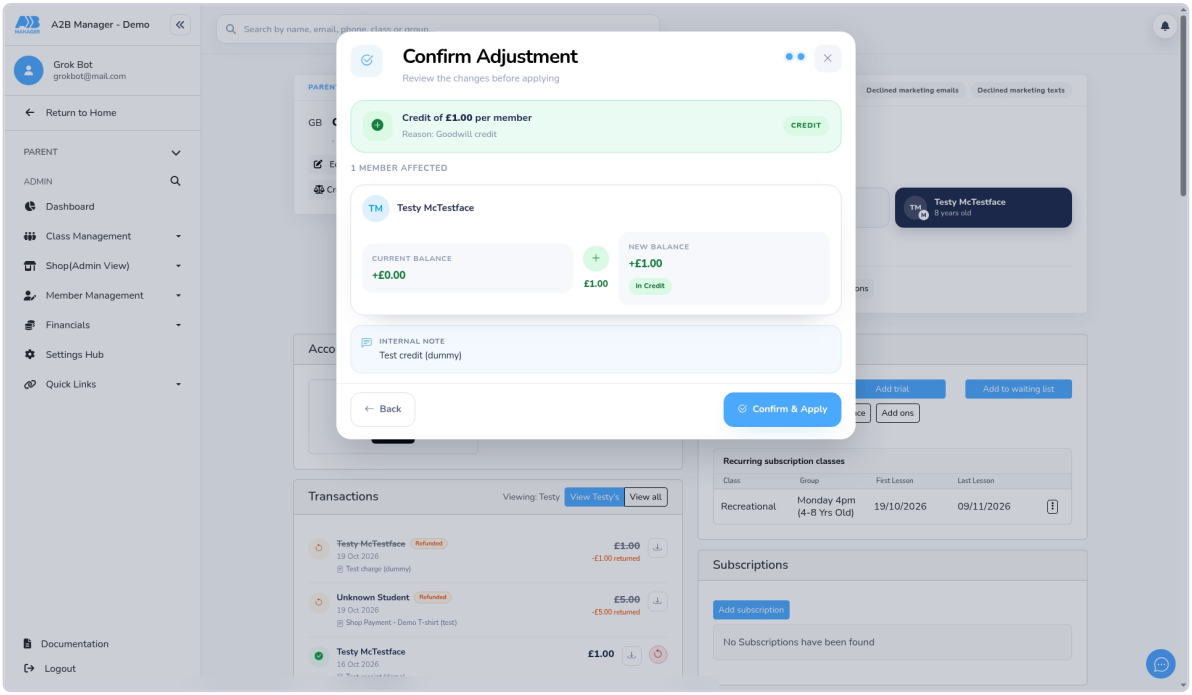
3. Enter the adjustment (0:09)

- 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.



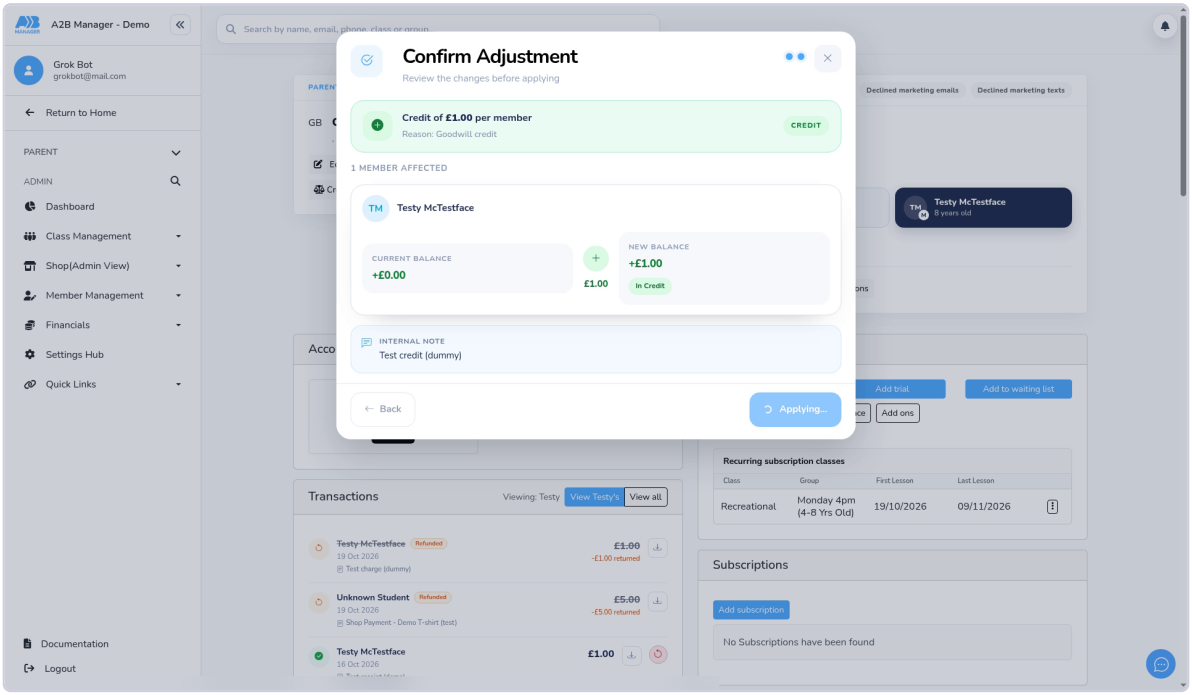
4. Review the adjustment (0:41)

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



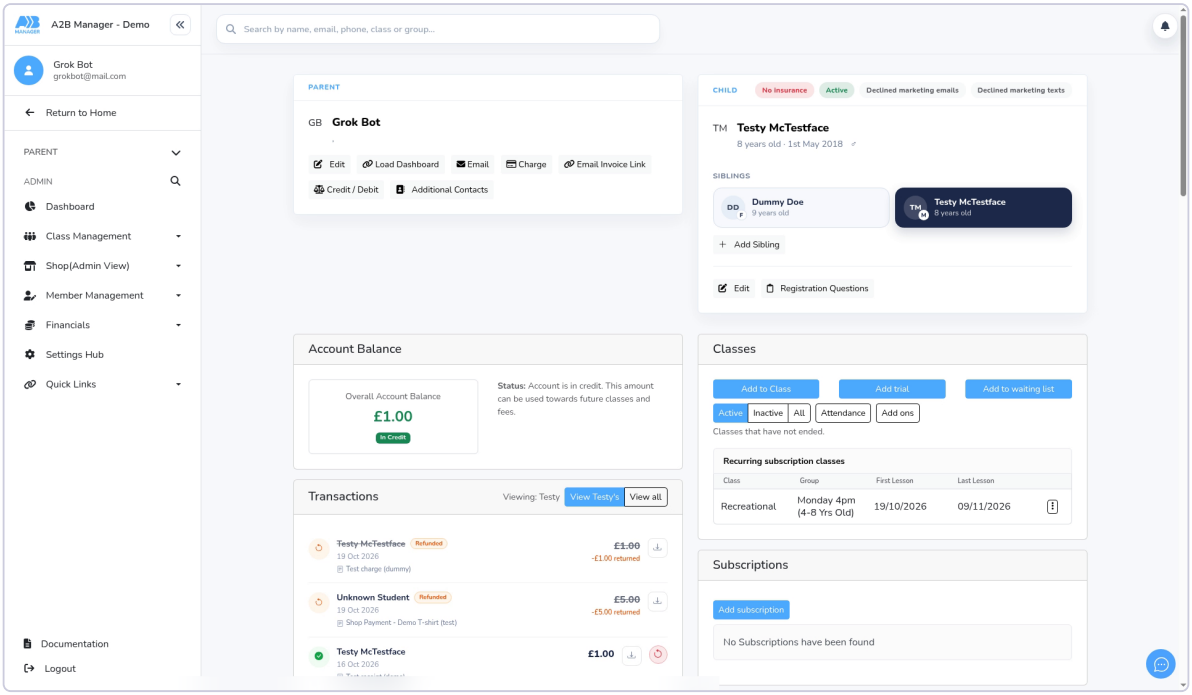
5. Confirm and apply (0:49)

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



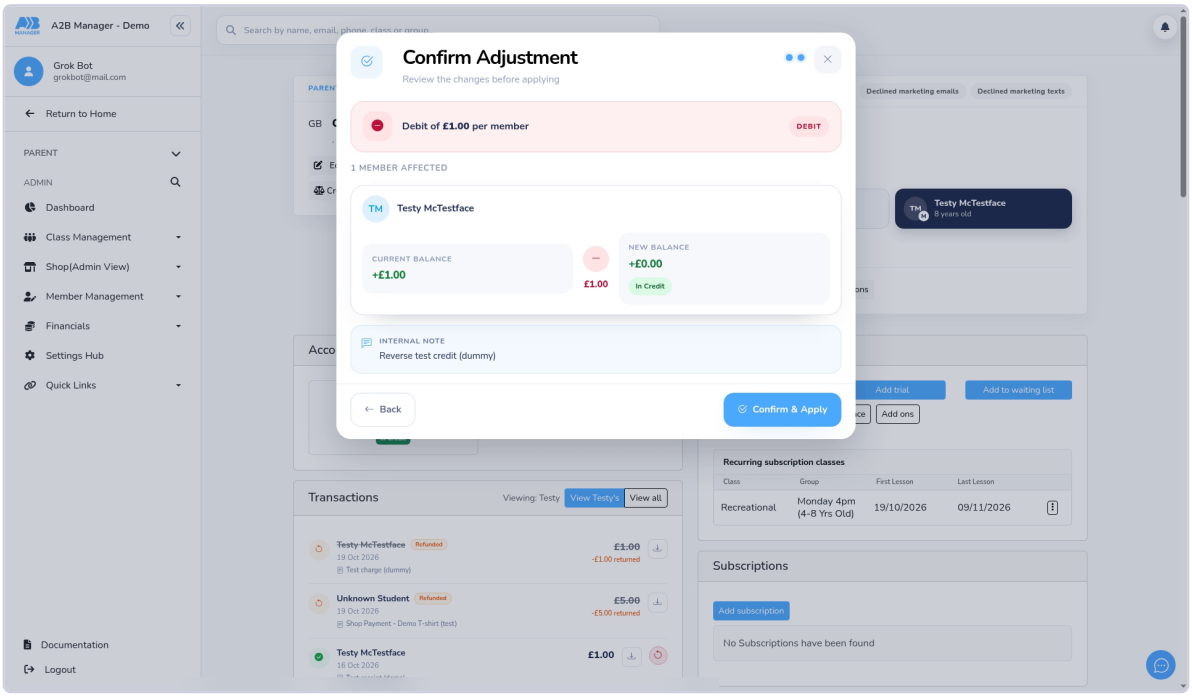
6. Check the new balance (0:56)

- 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.



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**).



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.