Financial- How to write off bad debt

The Charge/Reduce Revenue section allows administrators the ability to simplify adjustments made to financial ledgers for families in the system.

- Using this method, administrators can select what Type - Fee Valid Values can be setup in the system to have a write off adjustment.
- For a Type - Fee Valid Value to be used to write off, Write-Off Family Bad Debt must be selected in the Revenue Adjustment Type drop down list.

Here are the directions for how to add a type > fee valid value

Go to the family's financial ledger (how to search for a family)

Then on the family's financial ledger select the Actions menu, then select Charge/Reduce revenue.

Select the option- Write Off Family Bad Debt from the I WANT TO field.

Under the adjustment type menu select the Payment Write Off valid value.

Charge/Reduce Revenue

Family:	I WANT TO: *
Baggins Family	$ Write-Off Family Bad Debt

Adjustment Type: *
$ Payment Write Off

Please select an Adjustment Type

Payment Write Off

Notes:

Enter the adjustment amount, post date and any related note, then press Save.

Charge/Reduce Revenue

Family:
Baggins Family

I WANT TO: *
$ Write-Off Family Bad Debt ▼

Adjustment Type: *
$ Payment Write Off ▼

Adjustment Amount: *
$ -44

Post Date: *
📅 03/08/2018

Notes:
▤ Bad Debt

Period - show on current period (mm/dd/yyyy):

From Date:
📅 03/08/2018

To Date:
📅 03/08/2018

Summary

Balance before Adjustment:	440.00
Adjustment:	-44.00
Balance after Adjustment:	396.00

☑ Save