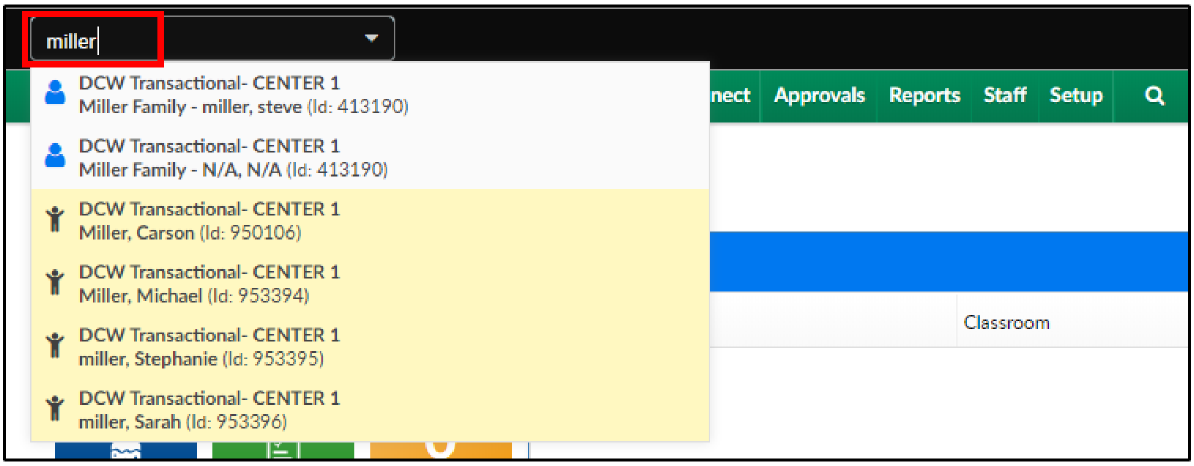
Family Record, Financials Tab - Make Payment

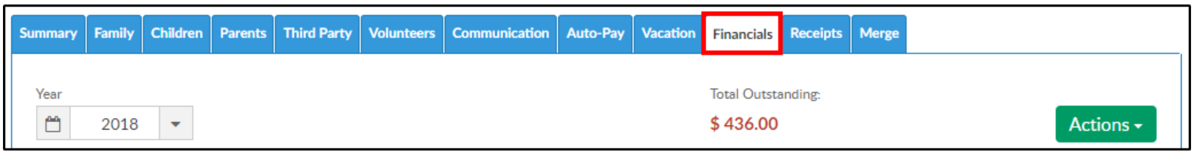
Last Modified on 01/11/2019 10:26 am EST

This screen only accepts paper-type payments; these include cash, check, and money order.

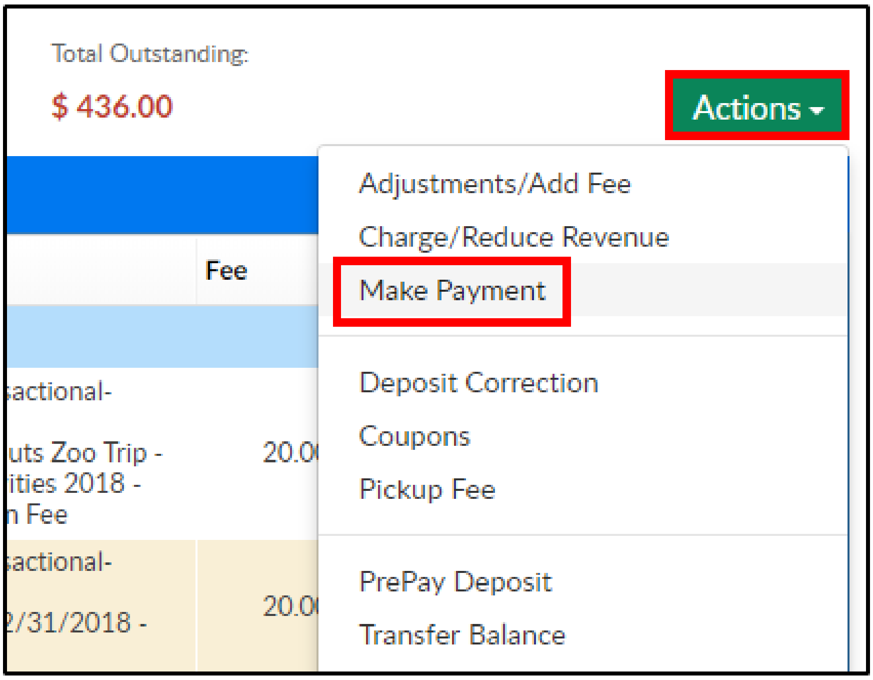
1. Navigate to the family's record



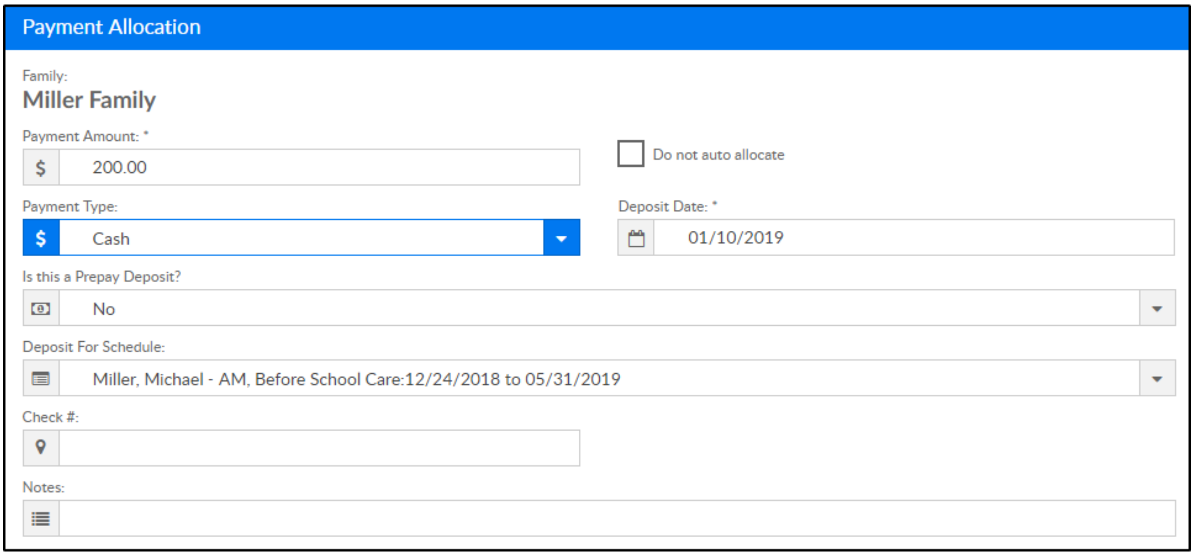
2. Click the Financial tab



3. Click Actions, then select Make Payment



4. Complete the Payment Allocation detail



   - Payment Amount - enter the amount of the payment
   - Do not auto allocate - if the payment should to be associated to specific line item, select this option and choose the line item below in the Allocation Details section
   - Payment Type - choose the payment type
   - Deposit Date - enter the date the deposit was made for the payment
   - Is this a Prepay Deposit? - if this is payment for a prepaid deposit, select the type, if not, select No
   - Deposit for Schedule - choose the student and schedule from the drop-down list to associate the payment to
   - Check # - enter the check number for the payment, if applicable
   - Notes - enter any necessary notes

5. Click Save