

Unused Credits

Overview

These instructions will show you how to view and manage your credits. You will be able to filter the credit status and amend or delete credits when necessary. All credits should be checked prior to re-enrolment.

View Credits

You can view unused credits by going to **Financials** on the Main Menu, then pressing **Unused Credits**.

Unused Credits

Show 10 entries

Filter summary

Credit Status
All
Clear

Edit	CDS	First Name	Surname	Credit Amount	Reason	Date Issued	Credit Status	Location	Activity	Delete
		Indigo	Spencer	£15.00	Jessica Spencer - Broken Arm	26-Nov-2020	Available	Undefined	Undefined	
		Indigo	Spencer	£10.00	Jessica Spencer - Course 180 refund. Paid lesson(s) 4,5	21-Dec-2020	Available	Brighton	Swimming Original	
		Indigo	Spencer	£15.00	Jessica Spencer - Cancellation of order 1054. Payment receipt no 127	21-Dec-2020	Available	Undefined	Undefined	
		Indigo	Spencer	£4.00	Jessica Spencer - Pool Closure 21/12/2020	21-Dec-2020	Available	Brighton	Swimming Original	
		Indigo	Spencer	£4.00	Jessica Spencer - Pool Closure 20/12/2020	21-Dec-2020	Available	Brighton	Swimming Original	
		Indigo	Spencer	£4.00	Jessica Spencer - Pool Closure 19/12/2020	21-Dec-2020	Available	Brighton	Swimming Original	

Showing 1 to 6 of 6 entries

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Exit

You can filter your search criteria. Here you can filter Available or Allocated credits.

You can organise the columns into ascending or descending by clicking on the arrows on each header.

The location column shows you the locations the credits are available to use in. Undefined means the credit was added manually via the CDS, not through group action.

Amend

You can amend the amount and description of each credit by selecting the **Edit** button.

Unused Credits

Show 10 entries

Search: indi

Filter summary

Credit Status
All
Clear

Edit	CDS	First Name	Surname	Credit Amount	Reason	Date Issued	Credit Status	Location	Activity	Delete
		Indigo	Spencer	£15.00	Jessica Spencer - Broken Arm	26-Nov-2020	Available	Undefined	Undefined	
		Indigo	Spencer	£10.00	Jessica Spencer - Course 180 refund. Paid lesson(s) 4,5	21-Dec-2020	Available	Brighton	Swimming Original	
		Indigo	Spencer	£15.00	Jessica Spencer - Cancellation of order 1054. Payment receipt no 127	21-Dec-2020	Available	Undefined	Undefined	
		Indigo	Spencer	£4.00	Jessica Spencer - Pool Closure 21/12/2020	21-Dec-2020	Available	Brighton	Swimming Original	
		Indigo	Spencer	£4.00	Jessica Spencer - Pool Closure 20/12/2020	21-Dec-2020	Available	Brighton	Swimming Original	
		Indigo	Spencer	£4.00	Jessica Spencer - Pool Closure 19/12/2020	21-Dec-2020	Available	Brighton	Swimming Original	

Showing 1 to 6 of 6 entries

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Previous 1 Next

Exit

The following box will appear. You can overtype the amount and reason; once the amendments have been actioned click **save**.

Amend Credit
✕

Amount £ 15.00

Reason Jessica Spencer - Broken Arm

Cancel
Save

Delete Credits

To delete a credit, simply click on the **delete** button and the following warning message will appear.

Delete Credit
✕

The credit for Indigo Spencer - Jessica Spencer - Broken Arm: £15.00 will be permanently deleted and cannot be recovered.

Cancel

🗑️ Delete

By clicking on **delete** this will delete the credit and it then cannot be recovered, however a note will be placed into the client's data sheet.

General Information

Display the number of entries per page.

Type your search criteria here. You can search student, or the reason of the credit to narrow your search.

Unused Credits

10 entries
Search: Indigo

Edit	CDS	First Name	Surname	Credit Amount	Reason	Date Issued	Credit Status	Location	Activity	Delete
		Indigo	Spencer	£15.00	Jessica Spencer - Broken Arm	26-Nov-2020	Available	Undefined	Undefined	
		Indigo	Spencer	£10.00	Jessica Spencer - Course 180 refund. Paid lesson(s) 4,5	21-Dec-2020	Available	Brighton	Swimming Original	
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Showing 1 to 6 of 6 entries
Previous **1** Next

Copy CSV Excel PDF Print
← Exit

At the bottom right of the page, you can navigate through pages using the **Previous** and **Next** buttons or by pressing the desired page number.



Export

You can copy and export the list of credits onto any file.

The copy button will simply copy the list and you can paste this into a document.

CSV and Excel will export to an excel file.

PDF will export the list to PDF

Print will allow you to print your list of activities.

