

Manage Deposit Types

Deposit Types allow administrators to define and manage various categories of deposits (e.g., for permits, equipment, or specific services). This feature is essential for accurately tracking refundable amounts, providing clear financial oversight, and ensuring proper accounting for deposited funds within the system.

Using this Feature

The **Manage Deposits** page provides a straightforward interface to add, edit, and view the usage of various deposit types.

1. Hover over **System Configuration**, then **Payments**, and click **Manage Deposit Types**.

Adding a Deposit Type

1. Click **Add Deposit Type**.
2. Fill out the information as needed:
 - **Label:** This is the name that will be used to identify the deposit type (e.g., "Permit Deposit," "Key Fob Deposit").
 - **Placeholder Text:** This field is optional. It provides a prompt or sample information that will appear in the deposit information text field when creating a deposit record.
 - **Flags:** This toggle controls the ability to edit the **Assignable Text** field in the resulting active deposit record. This text will appear in the user's profile associated with the deposit.
 - **Amount:** The amount that the deposit will cost.
 - **Active checkbox:** This determines if the deposit is currently available to be assigned.
3. Click **Save Changes**.

Editing a Deposit Type

1. Locate the deposit type and click the **Edit** button next to it.
2. Make any necessary changes to the fields.
3. Click **Save Changes**.

Deleting a Deposit Type

1. If no records are associated with this deposit you can click the **Delete** button.
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Best Practices & Considerations

- **Clear Labeling:** Use descriptive labels for your deposit types (e.g., "Annual Permit Deposit," "Visitor Pass Deposit") to ensure clarity for both administrators and users.
- **Placeholder Text Utility:** Utilize the **Placeholder Text** to provide clear instructions or examples for administrators when entering deposit information.
- **Understanding "Flags":** The "Flags" setting for Assignable Text can be useful for adding specific, customizable notes to individual deposit records on user profiles, allowing for unique details per transaction.
- **Financial Reconciliation:** Accurately tracking deposit types is crucial for financial reconciliation and managing refundable amounts.

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