



**Vision Computer Programming Services, Inc.**  
801 2nd Street, Suite A Safety Harbor, FL 34695  
888-425-6964 [email@visioncps.com](mailto:email@visioncps.com) [www.visioncps.com](http://www.visioncps.com)

## Charges and Payments – Apply Credits

If you have credit balances and want to apply then to a charge follow these steps:

This member has a \$20 Credit balance. To use this credit click Add Charge.

Members  
Unit: 01 **Edward Woods - 69** Status: Active  
Quick Find: Last Name, First Last Viewed

Member Info Contacts Medical General Household Custom Photo Outcome Measurements/Surveys Calendars / Activities  
Groups Guidance/Accidents/Mentoring Member Stars Charges / Payments Misc. Academics Medications

Only show transactions within last: 100 Days Only show charges for: All \* Double Click a payment to view more Details  
 Do Not Show Voids  Hide Transactions

Date	Account	Comment	Charge	Payment *	MOP *	Chk/MO#	Init	Receipt#
02/27/17	Weekly Fees		\$20.00				SS	
03/06/17	Weekly Fees		\$20.00				SS	
03/06/17	Weekly Fees			\$60.00	Check	452	SS	258

Charges Payments All Transactions **Member Credit: \$20.00**

**Add Charge** Add Payment Void Charge Print Statement Payment Coupons

New Member Delete Member Change Member Name Move Member Member History Hardcopy Member ID Card Chg/Pay HELP? Return to Search Close to Main Menu

You will see this screen indicating a credit balance in the middle of the screen.

Fill in the Account, Amount and Comment (optional).

Click the Use Credit button.

Add Charge(s) for Edward Woods  
 Autofill Comment from Account Name

Chg#	Charge Dt:	Account:	Amount:	Comment:
1.	03/15/2017			
2.	03/15/2017			
3.	03/15/2017			
4.	03/15/2017			
5.	03/15/2017			

Total Chg Amt: \$0.00  
Less Credit: **Unspent Payments for Member: \$20.00, Entire Household: \$20.00**  
Amount Due: \$0.00

**Use Credit**

Your screen will look like this.  
 Click the Auto-Distribute Unspent Payments button.

Add Charge(s) for Edward Woods

Autofill Comment from Account Name

Amt being applied to this charge Do not use Credit

Chg#	Charge Dt	Account	Amount	Comment	Credit	Do not use Credit
1.	03/13/2017	Weekly Fees - Weekly Fees	\$20.00			<input type="checkbox"/>
2.	03/15/2017					<input type="checkbox"/>
3.	03/15/2017					<input type="checkbox"/>
4.	03/15/2017					<input type="checkbox"/>
5.	03/15/2017					<input type="checkbox"/>

Total Chg Amt: \$20.00  
 Less Credit: \$0.00  
 Amount Due: \$20.00

Unspent Payments for Member: \$20.00, Entire Household: \$20.00

Refresh Credit Cancel Use of Credit

Member Household All

Payment Dt	Available	Amt Wish To Use	Amnt Allocated	Comment	Chg #
03/06/2017	\$20.00	\$0.00	\$0.00		0

Auto-Distribute Unspent Payments Manually Distribute Unspent Payments as Specified Above

NOTE: You may select either to Auto-Distribute or to Manually Distribute Credits.  
 Please click the "HELP?" button for more information on applying unspent payments.

The Auto-Distribute will fill in the Amnt Allocated.  
 Then click the Apply Charge (Pay Later).

Add Charge(s) for Edward Woods

Autofill Comment from Account Name

Amt being applied to this charge Do not use Credit

Chg#	Charge Dt	Account	Amount	Comment	Credit	Do not use Credit
1.	03/13/2017	Weekly Fees - Weekly Fees	\$20.00		\$20.00	<input type="checkbox"/>
2.	03/15/2017					<input type="checkbox"/>
3.	03/15/2017					<input type="checkbox"/>
4.	03/15/2017					<input type="checkbox"/>
5.	03/15/2017					<input type="checkbox"/>

Total Chg Amt: \$20.00  
 Less Credit: \$20.00  
 Amount Due: \$0.00

Unspent Payments for Member: \$20.00, Entire Household: \$20.00

Refresh Credit Cancel Use of Credit

Member Household All

Payment Dt	Available	Amt Wish To Use	Amnt Allocated	Comment	Chg #
03/06/2017	\$0.00	\$0.00	\$20.00		0

Auto-Distribute Unspent Payments Manually Distribute Unspent Payments as Specified Above

NOTE: You may select either to Auto-Distribute or to Manually Distribute Credits.  
 Please click the "HELP?" button for more information on applying unspent payments.

NOTE: If you are using a Credit and not actually receiving money, then the Payment Amount box MUST be \$0.00 so you will not create an overpayment.

Clear Screen Quick Pay this Charge (Single Payment) Quick Pay this Charge (Multiple Payments) Apply Charge (Pay Later) Cancel ?

And your screen will look like this.

Members

Unit:  **Edward Woods - 69** Status: Active

Quick Find:  Last Name, First

Member Info | Contacts | Medical | General | Household | Custom | Photo | Outcome Measurements/Surveys | Calendars / Activities  
 Groups | Guidance/Accidents/Mentoring | Member Stars | Charges / Payments | Misc. | Academics | Medications

Do Not Show Voids  Hide Transactions

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03/06/17	Weekly Fees			\$60.00	Check	452	SS	258
03/13/17	Weekly Fees		\$20.00				SS	

Charges  Payments  All Transactions **Balance Due: \$0.00**