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## **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													
<u>U</u> nit:	01	Edward Wo	oods - 69	Status:	Active				Quick F	Last National La	ame, F	irst ~	Last Viewed
Mer	mber Info	Contacts	Medical	General	Household	Custom	Photo	Ou	tcome Measu	rements/Sur	veys	Calendar	s / Activities
G	roups	Guidance/A	Accidents/Me	ntoring	Member Stars	Char	ges / Pay	ments	Misc.	Ac	ademic	s N	ledications
										ot Show Vo	oids	Hide Tra	ansactions
0 🛛	nly show	transactions v	within last:	100 Days	Only show c	harges for:	{All}	~	* Double C	lick a payr	nent to	view more	e Details
2	Date	Account		Comme	ent	Charge	e Pay	ment *	MOP *	Chk/MO#	Init	Receipt#	
	02/27/1	7 Weekly Fee	s			\$20.0	00				SS		
	03/06/1	7 Weekly Fee	s			\$20.0	00				SS		
	03/06/1	7 Weekly Fee	s					60.00	Check	452	SS	258	
									_				
2	narges	C Payme	ents 🤉 🤋 /	All Transacti	ons	Member	Credit:	\$20.0	U				
Add Add Void Charge Payment Charge							Print Paymer Statement Coupor						ayment oupons
N Me	e <u>w</u> [ mber N	Delete Chan Member	ige Member Name	Mo <u>v</u> e Member	Member History	<u>H</u> ardcopy			Membe ID Car	er Chg/P d HELF	ay 2?	<u>R</u> eturn 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 (	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, E	Use Credit									
	Amount Due:	\$0.00											

## 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														
Chg#	Charge Dt	A	ccount			Amount:	Con	nment:			Credit	Credit		
1.	03/13/2017		Veekly Fee	s - Weekly Fees	$\sim$	\$20.0	00					Г		
2.	03/15/2017				$\sim$					[		Г		
3.	03/15/2017				$\sim$					Γ	Г			
4.	03/15/2017				$\sim$					[		Г		
5.	03/15/2017				$\sim$					[		Г		
	Total Chg Amt Less Credit Amount Due:	3	\$20.00 \$0.00 \$20.00	Unspent Payments for	Me	mber: \$20.0	0, Entire	Household: \$20.0	)0	Refresh C	redit C	ancel Use of Credit		
	G Member C Household										C All			
						Payment Dt 03/06/2017	Available \$20.00	Amt Wish To Use \$0.00	Amnt Allocated	Comment	Chg #			
						00.00.2211								
Auto-Distribute Manually Distribute Unspent Payment Unspent Payments as Specified Above												Payments		
	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													
T Autofill Comment from Account Name Amt being applied to this charge													
Chg#	Charge Dt		Account:		Amount: Comment:							Credit	
1.	03/13/2017	Weekly Fees - Weekly Fees				\$20.0	0				[ [	Γ	
2.	03/15/2017										ſ		Г
3.	03/15/2017				~						[		Г
4.	03/15/2017										ſ		Г
5.	03/15/2017										[		Γ
Total Chg Amt     \$20.00     Unspent Payments for Member: \$20.00, Entire Household: \$20.00     Refresh Credit     Cancel Use of Credit													Cancel Use of Credit
	Amount Due: \$0.00											C All	
				4	Pa	yment Dt	Available	Am	t Wish To Use	Amnt Allocated	Comment	Chg #	
					03	3/06/2017	\$0.00		\$0.00	\$20.00		0	
									Auto-Di: Unspent F	stribute Payments	Manually Distrib as Sp	ute Unspen ecified Abov	t Payments re
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 yo	u are using	a Credit and not	actually receiving m	oney	, then the	Payment	Am	ount box MUS	T be \$0.00 so y	ou will not create	an overpay	ment.
Cle	ear Screen	Quick P (Sing	ay this Charge gle Payment)	Quick Pay this Ch (Multiple Payme	arge nts)	Apply C (Pay	Charge Later)				Cancel		?

## And your screen will look like this.

Membe	ers															
Unit: 01 Edward Woods - 69 Status: Active								▲ Last Name, First      ▲ Last Quick Find:      ▲ Last Viewed								
Mem	nber Info	Contac	cts	Medical	General Household Custor				Ph	oto Outo	ome Measurer	ments/Surve	ents/Surveys Calendars / Activities			
Gro	oups	Guidar	nce/Ac	cidents/Me	entoring Member Stars			Char	ges /	Payments	Misc.	Acad	emics	M	edications	
											Do Not	Show Void	s ſ	Hide Tra	nsactions	
🔽 Or	nly show ti	ransactio	ons wi	thin last: [	100 Days	Only sho	w cha	rges for:	{All}	~	* Double Clic	ck a payme	nt to v	iew more	Details	
$\square$	Date	Acco	ount		Comment			Char	ge	Payment *	MOP *	Chk/MO#	Init	Receipt#		
	02/27/17	Weekly	Fees					\$20	0.00				SS			
	03/06/17	Weekly	Fees					\$20	0.00				SS			
	03/06/17	Weekly	Fees							\$60.00	Check	452	SS	258		
	03/13/17	Weekly	Fees										SS			
່ດດ	hardoc	C Da	wmon	te el		ione		Palanaa	Due	. \$0.00						
	narges	U F d	ymen	1.5 1.6 /	าเสารสน			Balance	Due	. 40.00				1 -		
Add Add Void Charge Payment Charge										Print Payment Statement Coupons				yment oupons		
Ne Men	w D nber M	elete ember	Chang N	e Member lame	Mo <u>v</u> e Member	Membe Histor	y E	lardcopy			Member ID Card	Chg/Pay HELP?		eturn to Search	Close to Main Menu	