

Vision Computer Programming Services, Inc. 801 2nd Street, Suite A Safety Harbor, FL 34695 888-425-6964 <u>email@visioncps.com</u> <u>www.visioncps.com</u>

Charges and Payments – Apply Credit to Sibling

Siblings can frequently have money that needs to be re-distributed.

The first child has a charge and payment with a credit balance that you want to use on another child in the household.

This member has a \$25 Credit balance.

Memb	ers											
<u>U</u> nit:	01	Brandon Cl	ark - 76	Status: No	on-Active				{Search	n Form	<	Last Viewed
Mei	mber Info	Contacts	Medical	General	Household	Custom F	Photo C	outcome M	easurements/Sur	veys	Calendar	s / Activities
Gro	ups	Guidance/Accid	ents/Mentorin	g Memb	per Stars	Charges / Payme	nts Mi	sc. A	Academics I	Vedica	tions 1	Notes/Msgs
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	05/30/1	8 MEMB					\$50.00) Check	5324	SS	5	
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This member has a \$25 charge that needs to be paid with the \$25 credit from the sibling.

/lembers											
Jnit: 01	Brianna Cla	rk - 18	Status: No	on-Active			Quick F	Last Na	ame, Fi	irst ~	Last Viewe
Member Info	Contacts	Medical	General	Household	Custom F	Photo Out	tcome Measu	rements/Sur	/eys	Calendar	s / Activities
Groups	Guidance/Accide	ents/Mentorii	ng Mem	ber Stars	Charges / Payme	nts Misc	. Acade	emics I	Nedica	tions I	Notes/Msgs
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∠ Date	Account		Comme	nt	Charge	Payment *	MOP *	Chk/MO#	Init	Receipt#	
05/30/1	8 MEMB				\$25.00				SS		
Charges	C Payments	 All Trans 	sactions	Balance I	Due: \$25.00						
Add Charge	Add Payment		Void Charge			C	View Member's "PersonSCID" va	s lue Print	Stater	nent P	ayment Coupons
Ne <u>w</u> Member	Delete Chang Member	ge Member Name	Mo <u>v</u> e Member	Member History	<u>H</u> ardcopy		Member ID Card	? Chg/P	ay	Return to Search	Close to Main Me

Go back to the first members record and double click on the payment

Members													
<u>U</u> nit: 01	Unit: 01 Brandon Clark - 76 Status: Non-Active Quick Find: Viewed												
Member Info	Contacts	Medical	General	Househol	d	Custom	P	hoto Ou	itcome Measi	urements/Sur	veys	Calenda	rs / Activities
Groups	Guidance/Accid	ents/Mentoring	Memb	er Stars	Ch	arges / Pay	/men	ts Mise	c. Acad	lemics	Medica	ations	Notes/Msgs
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05/30/1	8 MEMB					\$25.	00				SS		
05/30/1	8 MEMB							\$50.00	Check	5324	SS	5	5

To see this screen, then click the Delete Payment Distribution(s) button at the bottom left.

View Payment									
Receipt #:	5	Payir	ng Member: Clark, Bran	don		N	1emb #: 76	6	
Payme	Date: 05/3 ent Amount: \$50.	0/2018 00							
Earmark	MOP: Che Unapplied Mone Comment:	ck y for This Acc	Check #: 5324			* (this the	Currently, the ' s Account' fea e Auto-Bill by F	Earmark Una ture only appli Household pro	pplied Money for ies when using ocedure.
Current Payr	ment Distribution				Di til ti	A 1			
2 Date			Comment		Distribution	Amnt	Memb C	narged	
Refunds	Refund Date	MOP	Refund C	Comment		Amnt	Refunded		
of Payment	ent has been improp	erly distributed, cl	lick below to delete the	Apply Payme	nttoan A	mount	Currently D	istributed:	\$25.00
distributions for use 'Fix Accou 'Apply Payn	Int Imbalance' on the nent to an Existing Ch	bottom right of Cl arge' here to re-	harges/Payments tab, or distribute the payment.	Existing Cl	harge	Amou	Amount nt Available	Refunded: e to Apply:	\$0.00 \$25.00

This will remove the distribution of the \$25 payment from the original charge and allow you to redistribute the payment to both members. Answer Yes below and then Close the View Payment screen.



1 Brando	n Clark - 76	Status: No	n-Active			Quick F	Last Na	ime, Fi	rst ~	
ember Info Contac	ts Medical	General	Household	Custom F	Photo Ou	tcome Measu	rements/Sun	/eys	Calendar	s / Activi
roups Guidance/	Accidents/Mentor	ng Membe	r Stars	Charges / Payme	nts Miso	. Acad	emics I	Nedica	tions N	lotes/M
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Date Acco	unt	Comment		Charge	Payment *	MOP *	Chk/MO#	Init	Receipt#	
05/30/18 MEMB				\$25.00	¢50.00	Charle	5004	SS	r	
05/30/18					\$50.00	Спеск	5324	55	5	
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Add Add Charge Payment		Void Charge				View Member' "PersonSCID" va	s Print	Staten	nent Pa	ayment
charge uyinen	9				· · ·					oupons

Click the Fix button on the bottom right next to the Account Imbalance!

Click the Apply Payment Button.

Unit: 01 Member Name: Clark, Brandon Member #: 76 Original Payment Date Payment Amount Unspent Amount 05/30/2018 \$50.00 \$50.00 Original Payment Date, Payment Date, 05/30/2018 \$50.00 Image: State of the state of t
Original Payment Date Payment Amount Unspent Amount 05/30/2018 \$50.00 \$50.00 1 1 1 1
If there is no money listed here, then this member's account is cleaned up. If there is money listed here and there are no Unpaid
If there is money listed here and there are no Unpaid
Click on the Apply Payment button Click

Unit: 01	-		Existing Distrit	oution		
Paver Clark Bra	andon		∠ Date	Distribution	Payee	
avment Date: 05/30	/2018					
Comment	/2010					
Comment.						
MOP: Check						
Pay Amount:	\$50.00					
Distribution:	\$0.00 <		Z Refund D	ate Amt Re	efunded	
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Show Unpaid Charges fo	Dr: Noto: The li	ist of Mambara will	Lookuinelude theee		This screen shows the	original
Show Unpaid Charges for Member C Househor	Dr: Note: The li DID C All Members in	ist of Members will n Units you are allo	I only include those owed to Modify.		This screen shows the payment, the distributio unspent money above	original on and any
Show Unpaid Charges for Member C Househor Member Clark, Brandon	Dr: Note: The li DID C All Members in Charge Date Acc 05/30/2018 MEM	ist of Members will n Units you are allo count Unpaid IB \$25.00	only include those bwed to Modify. Amnt to Pay \$0.00		This screen shows the payment, the distributio unspent money above To the left are the unpa	original on and any iid charges
Show Unpaid Charges for Member C Househo Member Clark, Brandon	Dr. Note: The li Dold All Members in Charge Date Acc 05/30/2018 MEM	ist of Members will n Units you are allo count Unpaid IB \$25.00	only include those wed to Modify. Amnt to Pay \$0.00	Auto-Distribute Unspent Payments	This screen shows the payment, the distributio unspent money above To the left are the unpa 1. Click on the Auto-Dis Unspent Payments bi apply unspent payme	original on and any iid charge: tribute utton to nts to
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Show Unpaid Charges for Member Charges for Member Clark, Brandon otal Designated Above:	Dr. Note: The li Did All Members in Charge Date Acc 05/30/2018 MEM \$0.00 Still Availab	ist of Members will n Units you are allo count Unpaid IB \$25.00	i only include those owed to Modify. Amnt to Pay \$0.00	Auto-Distribute Unspent Payments	This screen shows the payment, the distribution unspent money above To the left are the unpation 1. Click on the Auto-Dis Unspent Payments bit apply unspent payme unpaid charges 2. Click on the Apply Pation to Charge(s) button to IF there are no Unpaid	original on and any id charges tribute utton to nts to yment below. Charges, is montoo

Click the Household bullet to see all members in the household and their oustanding charges.

Click the Auto-Distribute Unspent Payments button and the system will apply the payment across both sibblings.

Unit: 101				Existing Distri	bution				
Paver Clark F	Brandon			∠ Date	Distri	bution		Payee	
avment Date: 05/	30/2018								
Comment:	50/2010								
MOP: Chock									
Dev Amount	\$50.00			_					
Pay Amount.	\$50.00					A 1 D (
Distribution:	\$0.00 ←			Z Refund L	Jate	Amt Refu	inded		
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Unit 01				Existing Distri	ibution			
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	, brando	<u></u>						
ayment Date: 0	5/30/201	8						
Comment:								
MOP: Chec	k							
Pay Amount	\$50.	.00						
Distribution:	\$0.	00 ←		Refund I	Date	Amt Ref	unded	
Unspont	\$50	00						
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Show Unpaid Charg	es for:	C All Note: The Members	list of Members will in Units you are allo	only include thos wed to Modify.	e		This so paymen unspen	creen shows the original nt, the distribution and any nt money above
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Click the Apply Payment to Charge(s) button.

Close this screen.

Unspent Payments				2
Unit: 01	Member Na	ame: Clark, Brandon		Member #. 76
∠ Original	Payment Date	Payment Amount	Unspent Amount	This screen shows the Original Payment Date, Payment Amount and the Unspent Amount.
				If there is no money listed here, then this member's account is cleaned up.
				If there is money listed here and there are no Unpaid Charges in the bottom left box on the next screen, then this
	Click on belo paye o	the Apply Payment bu w to apply the unspen ment to this member's utstanding charges.	utton t	member's account is cleaned up and the member will have a credit balance.
		Apply Payment		Close

The first members record will look like this:

Mem	bers											
<u>U</u> nit:	01	Brandon C	lark - 76	Status: N	on-Active			Quick F	Last Na ind:	ame, F	irst v	Last Viewed
Me	mber Info	Contacts	Medical	General	Household	Custom F	Photo Ou	tcome Measu	rements/Sun	/eys	Calendar	s / Activities
Gr	oups	Guidance/Accid	dents/Mentor	ing Mem	ber Stars C	Charges / Payme	nts Miso	c. Acade	emics I	Nedica	tions 1	lotes/Msgs
								□ Do N	ot Show Vo	ids	F Hide Tra	ansactions
ГΟ	only show	transactions v	within last:	90 Days	Only show c	harges for: A	}	* Double C	lick a payn	nent to	view more	e Details
	Date	Account		Comme	nt	Charge	Payment *	MOP *	Chk/MO#	Init	Receipt#	
	05/30/1	8 MEMB				\$25.00				SS		
	05/30/1	8 MEMB	0110 5			005.00	\$50.00	Check	5324	SS	5	
	05/30/1	8 MEMB	CHG FI	ROM Clark, E	srianna	\$25.00				- 55		
C C	hardes	C Payments	G All Tran	sactions	Balance	0.00 \$0.00						
6	Add			Jucuolij	Duidrice	Vac. \$0.00	-					
	harge	Payment						"PersonSCID" va	lue Print	Stater	nent C	oupons
	low dl	Delete Chan	an Momber	Maya	Mombor	- 1		Mombor		40	Potum to	Class to
Me	ember /	Member	Name	Member	History	Hardcopy		ID Card	Chg/P	ay	Search	Main Menu

The second members' record will look like this:

Me	mbers												
<u>U</u> ni	it: 01	Brianna Cla	ark - 18	Status: No	n-Active				Quick F	Last Na	ime, F	irst ~	Last Viewed
N	Nember Info	Contacts	Medical	General	Household	Custom	Photo	Out	come Measu	rements/Sun	/eys	Calendar	s / Activities
C	Groups	Guidance/Accid	dents/Mentorir	ng Mem	ber Stars	Charges / Pa	yments	Misc.	Acad	emics I	Nedica	tions I	Votes/Msgs
									🗆 Do N	ot Show Vo	ids	F Hide Tra	ansactions
Г	Only show	transactions v	vithin last:	90 Days	Only show	v charges for:	{AII}	\sim	* Double C	Click a payn	nent to	view more	e Details
Z	Date	Account		Comme	nt	Charg	e Payn	nent *	MOP *	Chk/MO#	Init	Receipt#	
	05/30/1	8 MEMB				\$25.	00				SS		
	05/30/1	8 MEMB	PAID BY	Clark, Bran	don (PayDt 8	5/30	\$2	25.00		5324	SS	5	
-	Charges	C Dourmonto		actions	Delener	. D 60.00							
۰,	Charges	Fayillents	·· / in frame	bacuoris	Dalance	- Due: \$0.00	·	_					
	Add Charge	Add Payment							View Member' PersonSCID" va	s lue Print	Stater	nent P	ayment oupons
-	New	Delete Chan	an Momber (Maya	Mombor	41	-	_	Member 4		40	Doturn to	Close to
	Member I	Member	Name	Member	History	Hardcopy			ID Card	Chg/Pa	ay	Search	Main Menu



Household Statement										
	Clark Household 1221 Miller Lane Anytown, FL 12345									
Starting Balance on 4/30/2018:				\$0.00					Printed: 05/30/2	018
	Date	Acct	Charges	Payments	MOF	Chk/MO#	Receip	ot#	Memb Chgd	
	05/30/18	MEMB	25.00						Clark, Brianna	
	05/30/18	MEMB	25.00						Clark, Brandon	
	05/30/18	Split		50.00	Cheo	k 5324		5		
Ending Balance on 5/30/2018: \$0.00									_	
	0-30 Days Past Due 31-60			Days Past Due		61-90 Days Past Due		Over 90 Days Past Due]
	\$0.00			\$0.00		\$0.00			\$0.00]