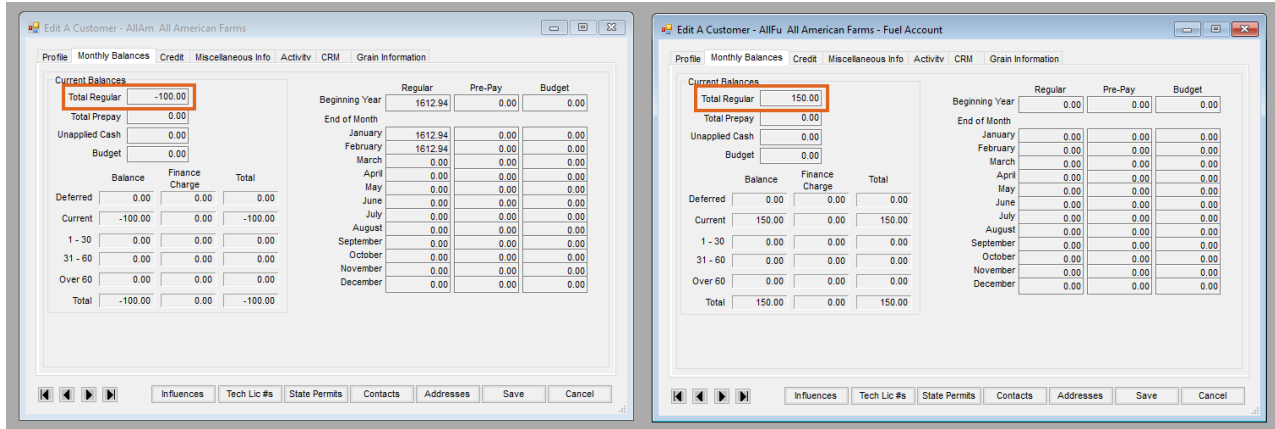


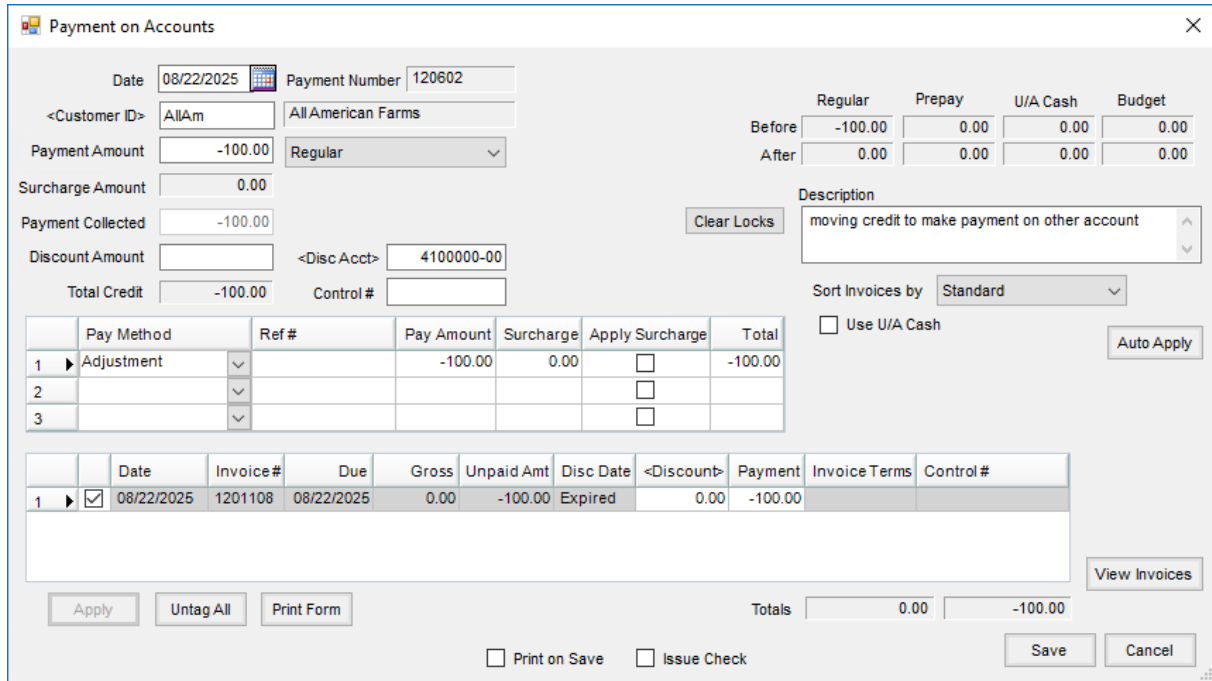
# Using a Credit on One Account to Pay on Another

Last Modified on 08/25/2025 8:36 am CDT

Customers with a credit on one account and a charge on another can use that credit to make a Payment on the account with a balance.



1. Add a Payment on the account with a credit.



2. Enter the credit as a negative *Pay Amount*.
3. Change the *Pay Method* to *Adjustment*.
4. In the *Description*, indicate the credit is being moved to the other account.
5. Add another Payment for the account with a balance.

**Payment on Accounts**

Date: 08/22/2025 Payment Number: 120603

<Customer ID> AllFu All American Farms - Fuel

Payment Amount: 100.00 Regular

Surcharge Amount: 0.00

Payment Collected: 100.00

Discount Amount: <Disc Acct> 410000-00

Total Credit: 100.00 Control #:

	Regular	Prepay	U/A Cash	Budget
Before	150.00	0.00	0.00	0.00
After	50.00	0.00	0.00	0.00

Description: payment coming from credit on other account

Sort Invoices by: Standard

Use U/A Cash

	Pay Method	Ref #	Pay Amount	Surcharge	Apply Surcharge	Total
1	Adjustment		100.00	0.00	<input type="checkbox"/>	100.00
2					<input type="checkbox"/>	
3					<input type="checkbox"/>	

	Date	Invoice #	Due	Gross	Unpaid Amt	Disc Date	<Discount>	Payment	Invoice Terms	Control #
1	08/22/2025	1201107	09/15/2025	150.00	150.00	Expired	0.00	100.00	N15	

Totals: 0.00 100.00

Buttons: Apply, Untag All, Print Form, View Invoices, Save, Cancel, Print on Save, Issue Check

- Enter the credit amount as a positive *Pay Amount*.
- Use *Adjustment* as the *Pay Method*.
- Indicate the Payment is coming from a credit balance from the other account.

The *Pay Methods* used for both Payments are the same (best practice is *Adjustment*) and the account with a balance owed is reduced by the amount of the credit.

**Edit A Customer - AllAm All American Farms**

Profile | Monthly Balances | Credit | Miscellaneous Info | Activity | CRM | Grain Information

**Current Balances**

Total Regular	0.00
Total Prepay	0.00
Unapplied Cash	0.00
Budget	0.00

	Regular	Pre-Pay	Budget
Beginning Year	1612.94	0.00	0.00
End of Month			
January	1612.94	0.00	0.00
February	1612.94	0.00	0.00
March	0.00	0.00	0.00
April	0.00	0.00	0.00
May	0.00	0.00	0.00
June	0.00	0.00	0.00
July	0.00	0.00	0.00
August	0.00	0.00	0.00
September	0.00	0.00	0.00
October	0.00	0.00	0.00
November	0.00	0.00	0.00
December	0.00	0.00	0.00

**Edit A Customer - AllFu All American Farms - Fuel Account**

Profile | Monthly Balances | Credit | Miscellaneous Info | Activity | CRM | Grain Information

**Current Balances**

Total Regular	50.00
Total Prepay	0.00
Unapplied Cash	0.00
Budget	0.00

	Regular	Pre-Pay	Budget
Beginning Year	0.00	0.00	0.00
End of Month			
January	0.00	0.00	0.00
February	0.00	0.00	0.00
March	0.00	0.00	0.00
April	0.00	0.00	0.00
May	0.00	0.00	0.00
June	0.00	0.00	0.00
July	50.00	0.00	50.00
August	0.00	0.00	0.00
September	0.00	0.00	0.00
October	0.00	0.00	0.00
November	0.00	0.00	0.00
December	0.00	0.00	0.00