

# How To Transfer Unapplied Cash from one Customer to Another

Last Modified on 09/13/2024 4:08 pm EDT

## Customer Account – Transfer From

Open the Customer Account where the Unapplied Cash is currently applied.

Right-click on the Unapplied Cash line and select “Transfer to Another Customer.”

Credit #	Site Name	Credit Type	Date	Amount	Balance
497878	Elizabeth Arrington	CREDIT	7/10/2024	\$57.18	\$2.18
497465	Elizabeth Arrington	CREDIT	5/13/2024	\$106.50	\$106.50
497796	Elizabeth Arrington	CREDIT	5/22/2024	\$200.00	\$200.00
497795	Elizabeth Arrington	CREDIT	5/22/2024	\$250.00	\$250.00
497463	Elizabeth Arrington	CREDIT	5/13/2024	\$255.52	\$255.52
497466	Elizabeth Arrington	CREDIT	3/29/2024	\$275.00	\$275.00
497793	Elizabeth Arrington	CREDIT	5/22/2024	\$297.58	\$297.58
497461	Elizabeth Arrington	CREDIT	5/13/2024	\$250.00	\$250.00
2889	Elizabeth Arrington	ADVDEP			
	Elizabeth Arrington	CASH			
453179	Elizabeth Arrington	CREDIT			
3000	Elizabeth Arrington	ADVDEP			

Apply  
 Auto Apply  
**Transfer To Another Customer**  
 Refresh

Enter the Customer Number where the Unapplied Cash should be transferred.

A Transfer Cash box will open asking you to confirm the Transfer From and Transfer To. Select Yes.

Transfer Cash

Are you sure you want to transfer \$350.00 From Customer Number: 48977 To Customer: 48800

## Customer Account – Transferred To

Open the Customer Account where the Unapplied Cash was Transferred To, and the Unapplied Cash will be listed under Open Credits.

Invoice #	Site Name	Description	Date	Amount	Net Due
497944	Amy - Main House	Installation Services	4/1/2024	\$375.00	\$375.00
497948	Amy - Main House	Installation Services	7/31/2024	\$250.00	\$250.00
497951	Amy Bartmus - Pool House	Installation Services	8/2/2024	\$6,513.75	\$6,513.75
497970	Amy - Main House	Installation Services	8/12/2024	\$85,757.04	\$85,757.04
497989	Amy - Main House	Service Call	8/14/2024	\$133.72	\$133.72

  

Credit #	Site Name	Credit Type	Date	Amount	Balance
497934	Amy Bartmus	CREDIT	7/29/2024	\$538.87	\$4.37

## Event Log

The Event Log records the Transfer on both Customer Accounts.

Time Stamp	User Code	Type	Description
8/18/2024 7:30:47 AM	AEB	UPDATE	Cash Transferred to Customer 48800

Time Stamp	User Code	Type	Description
8/18/2024 7:30:47 AM	AEB	ADD	Cash Transferred From Customer 48977

The Transfer will not show under Payments on the Customer Account it was transferred To because the original Payment/Deposit is linked to the Customer Account that Transferred the Credit.