# Reverse/Transfer/Split Payments

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**Pathway:** *Accounts > Search > Account*

From an account's AR History screen, the option to Reverse/Transfer/Split payment is available to manually recorded payments (payments made in either cash or check form).
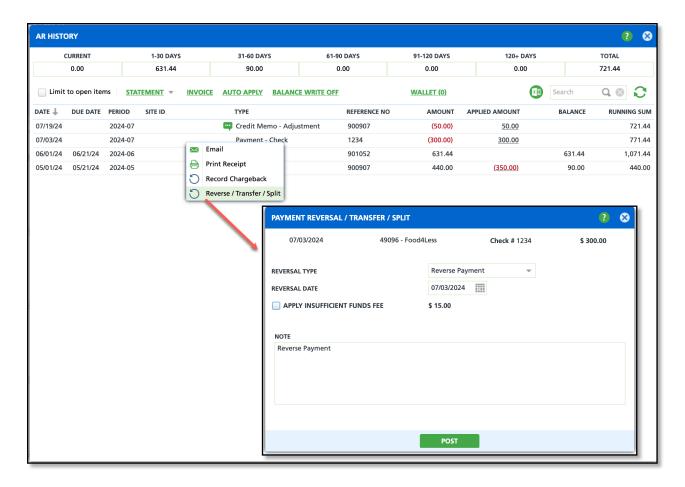
## Permissions

The following permissions are required to Reverse/Transfer/Split payments:

| Permission ID | Permission Name |
|---:|---|
| 5 | View Account |
| 6 | View Site |
| 41 | View AR History |

## Payment Reversal

In scenarios such as a check returned for insufficient funds, the payment can be reversed on the customer's account using the Reverse Payment option. This does not create a refund (no funds were collected) and is not considered a voided payment.



## Reverse A Payment

After a payment has been reversed it will display similar to what is shown below. If a note was added, it can be

1. Right-click within the row of the payment you would like to reverse.

2. Select **Reverse/Transfer/Split.**

3. Select **Reverse Payment** from the drop down options in the Payment Reversal / Transfer / Split popup window.

4. Enter a **Note** to record the reason the payment was reversed.
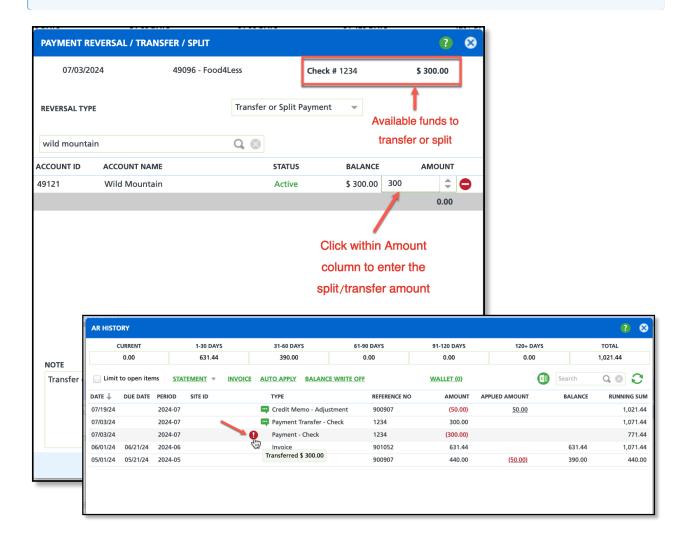
5. Select **Post** when finished.

# Transfer/Split Payments

Payments can be transferred or split between accounts to correct an error, or to satisfy a customer's payment handling request.

**ℹ** **Example Scenarios**
- **Split Payments:** Customer has multiple accounts they would like the payment split between.
- **Transfer Payments:** Payment was made to the wrong account in error.

# Transfer/Split Payments

> Payments that are split or transferred to other accounts will be recorded as a reversal on the current account and applied as a payment on the target account(s).

1. Right-click within the row of the payment you would like to transfer or split.

2. Select **Reverse/Transfer/Split.**

3. Select **Transfer / Split** from the drop down options in the Payment Reversal / Transfer / Split popup window.

4. Search for the account(s) the payment will be transferred to or split between in the **Search Account** field. Upon searching, the returned results will auto-populate in the payment editor section below the search.

5. Select within the **Amount** field and enter the amount that will be split or transferred.

   ○ The payment amount received displays at the top for reference.

6. Enter a **Note** to record the reason the payment was either transferred or split. Notes display in the AR History ledger with the change.

7. Select **Post** when finished.