Rate Sheet Import

Last Modified on 01/22/2019 8:44 am EST

From the setup menu, select the rates option.

Se	arch			•								B	usiness Lev
☆	Home	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	۹	
	Home Information								Semester				
Bi	illing Period	: 07/01/2	018 to 07/31	/2018							Classr	oom	
					Cla	issroom	List				Classr	oom Summary	
	i			31	Cente	er				Classroo	Rates	շխղ	
	Informatio	n s	Schedules	Semester	DC	V- Defined Center 1		Flexib		Fees	\cup	'n	

Then select the actions button and the company rate export sheet option. This sheet will open in excel.

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Search Panel	
ate Selection Criteria	
how All:	
FILTER	
Actions -	
Setup Scholarships	
Setup Rate Category	
Setup Rate Offset	
Setup Allocation Period	
Setup Discounts	
Setup Coupons	
Setup Pre-Bill	
Setup Pre-Bill Export Rate Sheet	
Setup Pre-Bill Export Rate Sheet Export Rate Sheet - PDF	
Setup Pre-Bill Export Rate Sheet Export Rate Sheet - PDF Company Rate Export Sheet	

If existing rates need to be updated, delete all other rates and add rates into days 1-5 with the new effective date Save the file to your computer.

On the Setup > Rates screen select the Rate Sheet Import option at the top of the screen.

Set	Setup -> Rates				
	Rate Sheet Import				
	Search Pa				
	Rate Selection Criteria				
	Show All:				
	FILTER				

Select the updated file from your computer, then select rate import version 3. Press Import.



Once the rate sheet has been imported a confirmation message will appear on the screen. A spreadsheet will download and display if the import has been successful or not (column AV).

Common Errors include:

- Wrong rate effective date
- No GL Account on the rate
- Wrong center ID associated to the rate