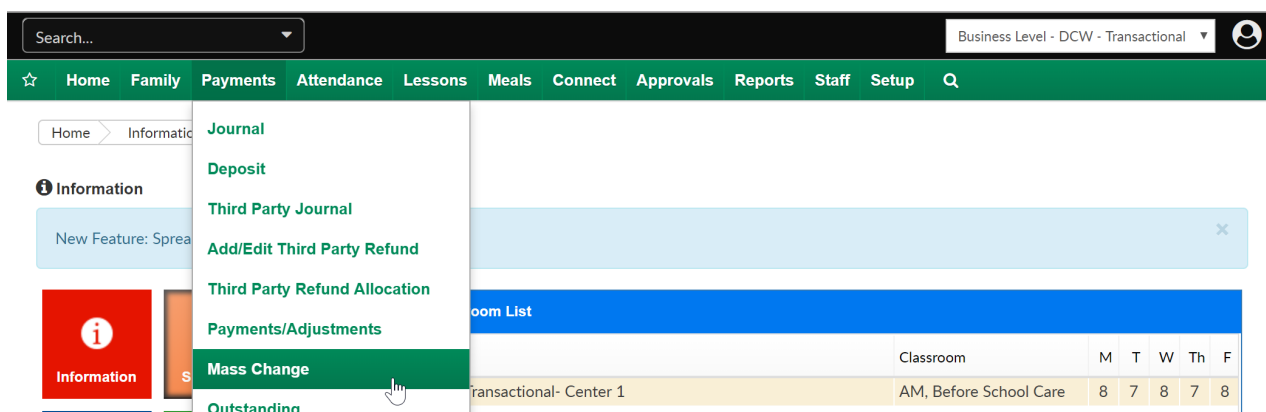


Payments > Mass Change

Last Modified on 05/15/2020 9:49 am EDT

This screen updates multiple payments entered into the system at once. This is frequently used to update the deposit date, check number, payment type, period number or adding notes to previous payments.

From the Payments menu select the Mass Change option.



On the Mass Change page, select the Search Criteria box to find payments that need to be updated or changed. Once you have entered criteria, press View to update results. *At the very least, search by Entry Begin Date and End Date to see payments.*

- Center
- Deposit Begin Date
- End Date
- Entry Begin Date
- End Date
- Funding Type
- Payment Type
- Batch #
- Assigned Batch #
- Check #
- Posted By (User ID)
- Family ID

- Include Agency Payments
- From Letter
- To Letter

Payments > Mass Change

Showing results for:
 Funding Type: All Include Agency Payments? : Yes Search Criteria

Mass Change Payment List

No results found for the search criteria.

Search Criteria

Center: --

Deposit Begin Date:

End Date:

Entry Begin Date:

End Date:

Funding Type: All

Payment Type: All

Batch #:

Assigned Batch #:

Check #:

Posted By (User ID):

Family ID:

Include Agency Payments? Yes No

From Letter: --

To Letter: --

View

Results based on search criteria will display.

- Family
- Amount Received
- Payment Type
- Check Number
- Date Received
- Batch
- Notes
- Posted

Select the payments in the Payment List section to identify the payments that will be changed. By default, all of the payments in the Payment List will

be automatically checked.

Payments > Mass Change

Showing results for:
Funding Type: All Include Agency Payments? : Yes Search Criteria ▾

Mass Change Payment List

Family	Amount Received	Payment Type	Check Number	Date Received	Batch	Notes	Posted
<input checked="" type="checkbox"/> Brave Family	85.00	Check	12345	10/27/2017	0 /	Extra payment note	CGTransactional
<input checked="" type="checkbox"/> Doolittle Family	60.00	Cash		09/29/2017	0 /		dcw_kgass
<input checked="" type="checkbox"/> Doolittle Family	105.00	Cash		10/27/2017	0 /		CGTransactional
<input checked="" type="checkbox"/> Frozen Family	300.00	Check	12345	10/27/2017	0 /	Prepay for next week.	CGTransactional
<input checked="" type="checkbox"/> Frozen Family	300.00	Check	12345	10/27/2017	0 /		CGTransactional
<input checked="" type="checkbox"/> Frozen Family	416.00	Cash		10/27/2017	0 /		CGTransactional
<input checked="" type="checkbox"/> Wonderland Family	200.00	Check	2223	10/27/2017	0 /	Partial pay	CGTransactional

[Check All](#) / [Uncheck All](#)

Total Cash:	\$581.00
Total Check:	\$885.00
Total:	\$1,466.00

In the Payment Box enter the new detail that the payments will be updated to include. After entering updated detail, press Save to commit changes.

- To Deposit Date- this will update the deposit date to the text entered for the selected payments
- To Check Number- this will update the check number to the text entered for the selected payments
- To Payment Type- this will change the payment type for the selected payments
- To Period- this option will only display if billing is set to defined, select the period the selected payments should be moved to
- Note- this will update the note text for the selected payments

Mass Change Payment List

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<input checked="" type="checkbox"/> Brave Family	85.00	Check	12345	10/27/2017	0 /	Extra payment note	CGTransactional
<input checked="" type="checkbox"/> Doolittle Family	60.00	Cash		09/29/2017	0 /		dcw_kgass
<input checked="" type="checkbox"/> Doolittle Family	105.00	Cash		10/27/2017	0 /		CGTransactional
<input checked="" type="checkbox"/> Frozen Family	300.00	Check	12345	10/27/2017	0 /	Prepay for next week.	CGTransactional
<input checked="" type="checkbox"/> Frozen Family	300.00	Check	12345	10/27/2017	0 /		CGTransactional
<input checked="" type="checkbox"/> Frozen Family	416.00	Cash		10/27/2017	0 /		CGTransactional
<input checked="" type="checkbox"/> Wonderland Family	200.00	Check	2223	10/27/2017	0 /	Partial pay	CGTransactional

[Check All](#) / [Uncheck All](#)

Total Cash:	\$581.00
Total Check:	\$885.00
Total:	\$1,466.00

Payment Change

To Deposit Date

To Check Number

To Payment Type

Note

[Save](#)

Once the change has been saved, a confirmation box will display-

Payments > Mass Change

SUCCESS

Save Complete

Showing results for:

Funding Type: All Include Agency Payments? : Yes [Search Criteria](#)

Mass Change Payment List

Family	Amount Received	Payment Type	Check Number	Date Received	Batch	Notes	Posted
<input checked="" type="checkbox"/> Brave Family	85.00	Check	12345	10/27/2017	0 /	Extra payment note	CGTransactional
<input checked="" type="checkbox"/> Doolittle Family	60.00	Cash		09/29/2017	0 /		dcw_kgass
<input checked="" type="checkbox"/> Doolittle Family	105.00	Check		10/27/2017	0 /		CGTransactional
<input checked="" type="checkbox"/> Frozen Family	300.00	Check	12345	10/27/2017	0 /	Prepay for next week.	CGTransactional
<input checked="" type="checkbox"/> Frozen Family	416.00	Check	12345	10/27/2017	0 /		CGTransactional
<input checked="" type="checkbox"/> Frozen Family	300.00	Check	12345	10/27/2017	0 /		CGTransactional
<input checked="" type="checkbox"/> Wonderland Family	200.00	Check	2223	10/27/2017	0 /	Partial pay	CGTransactional

