Payments > Mass Change

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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

wing results for:			_	
nding Type: All Include Agency Payments? : Yes			Sea	rch Criteria
lass Change Payment List	Search Criteria Q			
	Center:			
o results found for the search criteria.				
	Deposit Begin Date		End Date	
	—		 	
	Entry Begin Date		End Date	
	<u>e</u>			
	Funding Type		Payment Type	
	♀ All	-	I All	
	Batch #		Assigned Batch #	
	Q		Q	
	Check #		Posted By (User ID)	
	Image: Second			
	Family ID		Include Agency Payments?	
	Q		Yes No	
	From Letter		To Letter	
	•	-	Q	
	~		5	

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.

Showing results for:							
Funding Type: All Include	Agency Payments	? : Yes					Search Criteria
Mass Change Paym	ent List						
amily	Amount Received	Payment Type	Check Number	Date Received	Batch	Notes	Posted
Brave Family	85.00	Check	12345	10/27/2017	0 /	Extra payment note	CGTransactiona
Doolittle Family	60.00	Cash		09/29/2017	0 /		dcw_kgass
Doolittle Family	105.00	Cash		10/27/2017	0 /		CGTransactiona
Frozen Family	300.00	Check	12345	10/27/2017	0 /	Prepay for next week.	CGTransactiona
Frozen Family	300.00	Check	12345	10/27/2017	0 /		CGTransactiona
Frozen Family	416.00	Cash		10/27/2017	0 /		CGTransactiona
Wonderland Family	200.00	Check	2223	10/27/2017	0 /	Partial pay	CGTransactiona
			¢	581.00			,
∢ <mark>Check All / Uncheck All</mark> Total Cash: Total Check:				581.00 385.00			,

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 Payme	nt List							
Family	Amount Received	Payment Type	Check Number	Date Received	Batch	Notes	Posted	-
Brave Family	85.00	Check	12345	10/27/2017	0 /	Extra payment note	CGTransactiona	al
Doolittle Family	60.00	Cash		09/29/2017	0 /		dcw_kgass	
Doolittle Family	105.00	Cash		10/27/2017	0 /		CGTransactiona	al
Frozen Family	300.00	Check	12345	10/27/2017	0 /	Prepay for next week.	CGTransactiona	al
Frozen Family	300.00	Check	12345	10/27/2017	0 /		CGTransactiona	al
Frozen Family	416.00	Cash		10/27/2017	0 /		CGTransactiona	al
Wonderland Family	200.00	Check	2223	10/27/2017	0 /	Partial pay	CGTransactiona	al
Check All / Uncheck All Total Cash: Total Check: Total:			\$8	381.00 385.00 466.00				
Payment Change				To Check I	Number			
					Tamber			
To Payment Type								
No Change				-				
Note								
								7
							Save	

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

Payments Mass Change	e						
Success Save Complete							
Showing results for:							
							Search Criteria
Funding Type: All Include	e Agency Payments	? : Yes					Search Chiteria
Mass Change Payn	nent List						
	nent List Amount Received	Payment Type	Check Number	Date Received	Batch	Notes	Posted
amily	Amount	Payment Type Check	Check Number 12345	Date Received 10/27/2017	Batch 0 /	Notes Extra payment note	Posted CGTransactional
amily Brave Family	Amount Received						
amily Brave Family Doolittle Family	Amount Received 85.00	Check		10/27/2017	0 /		CGTransactional
amily ⁰ Brave Family ¹ Doolittle Family ² Doolittle Family	Amount Received 85.00 60.00	Check Cash		10/27/2017 09/29/2017	0 / 0 /		CGTransactional dcw_kgass
amily Brave Family Doolittle Family Doolittle Family Frozen Family	Amount Received 85.00 60.00 105.00	Check Cash Check	12345	10/27/2017 09/29/2017 10/27/2017	0 / 0 / 0 /	Extra payment note	CGTransactional dcw_kgass CGTransactional
amily 8 Brave Family 9 Doolittle Family	Amount Received 85.00 60.00 105.00 300.00	Check Cash Check Check	12345	10/27/2017 09/29/2017 10/27/2017 10/27/2017	0 / 0 / 0 / 0 /	Extra payment note	CGTransactional dcw_kgass CGTransactional CGTransactional