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) | |
| | ♀ | | | |
| | Family ID | | Include Agency Payments? | |
| | Q | | Yes No | |
| | From Letter | | To Letter | |
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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 / | Gency Payments | 2 · Vec | | | | | Search Criteria 🗸 |
| Funding type. All Include A | Agency Fayments | | | | | | |
| | | | | | | | |
| Mass Change Payme | ent 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 | CGTransactional |
| Doolittle Family | 60.00 | Cash | | 09/29/2017 | 0 / | | dcw_kgass |
| Doolittle Family | 105.00 | Cash | | 10/27/2017 | 0 / | | CGTransactional |
| Frozen Family | 300.00 | Check | 12345 | 10/27/2017 | 0 / | Prepay for next week. | CGTransactional |
| Frozen Family | 300.00 | Check | 12345 | 10/27/2017 | 0 / | | CGTransactional |
| Frozen Family | 416.00 | Cash | | 10/27/2017 | 0 / | | CGTransactional |
| Wonderland Family | 200.00 | Check | 2223 | 10/27/2017 | 0 / | Partial pay | CGTransactional |
| | | | | | | | |
| 4 | | | | | | | b. |
| Check All / Uncheck All | | | | | | | P P |
| Total Cash: | | | \$5 | 581.00 | | | |
| Total Check: | | | \$2 | 885.00 | | | |
| | | | Ψ | 505.00 | | | |

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 |
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| 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: | | | \$5 \$8 \$1, | 881.00 885.00 466.00 | | | | |
| Payment Change | | | | To Check I | Number | | | |
| | | | | o | Tamber | | | |
| | | | | | | | | |
| To Payment Type | | | | | | | | |
| No Change | | | | - | | | | |
| Neto | | | | | | | | |
| | | | | | | | | 7 |
| | | | | | | | | |
| | | | | | | | Save | |

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

| Success Save Complete | | | | | | | |
|---|--|---|--|--|---|---|--|
| Showing results for: Funding Type: All Include | Agency Payments | ? : Yes | | | | | Search Criteria 🗸 |
| Mass Change Paym | ent List | | | | | | |
| Mass Change Paym | ent List Amount Received | Payment Type | Check Number | Date Received | Batch | Notes | Posted |
| Mass Change Paym Family | ent List Amount Received 85.00 | Payment Type Check | Check Number 12345 | Date Received | Batch 0 / | Notes Extra payment note | Posted CGTransactional |
| Mass Change Paym Family | Amount Received 85.00 60.00 | Payment Type Check Cash | Check Number 12345 | Date Received 10/27/2017 09/29/2017 | Batch 0 / 0 / | Notes Extra payment note | CGTransactional dcw_kgass |
| Mass Change Paym | ent List Amount Received 85.00 60.00 105.00 | Payment Type Check Cash Check | Check Number 12345 | Date Received 10/27/2017 09/29/2017 10/27/2017 | Batch 0 / 0 / 0 / | Notes Extra payment note | CGTransactional dcw_kgass CGTransactional |
| Mass Change Paym | Amount Amount Received 85.00 60.00 105.00 300.00 | Payment Type Check Cash Check Check | Check Number 12345 12345 | Date Received 10/27/2017 09/29/2017 10/27/2017 10/27/2017 | Batch 0 / 0 / 0 / 0 / | Notes Extra payment note Prepay for next week. | CGTransactional dcw_kgass CGTransactional CGTransactional |
| Mass Change Paym | ent List Amount Received 85.00 60.00 105.00 300.00 416.00 | Payment Type Check Cash Check Check Check | Check Number 12345 12345 | Date Received 10/27/2017 09/29/2017 10/27/2017 10/27/2017 10/27/2017 10/27/2017 | Batch 0 / 0 / 0 / 0 / 0 / | Notes Extra payment note Prepay for next week. | CGTransactional dcw_kgass CGTransactional CGTransactional CGTransactional |
| Mass Change Paym | Amount Received 85.00 60.00 105.00 300.00 416.00 300.00 | Payment Type Check Cash Check Check Check Check | Check Number 12345 12345 12345 12345 | Date Received 10/27/2017 09/29/2017 10/27/2017 10/27/2017 10/27/2017 10/27/2017 10/27/2017 | Batch 0/ 0/ 0/ 0/ 0/ 0/ | Notes Extra payment note Prepay for next week. Image: Contract of the second | CGTransactional CGTransactional dcw_kgass CGTransactional CGTransactional CGTransactional |