

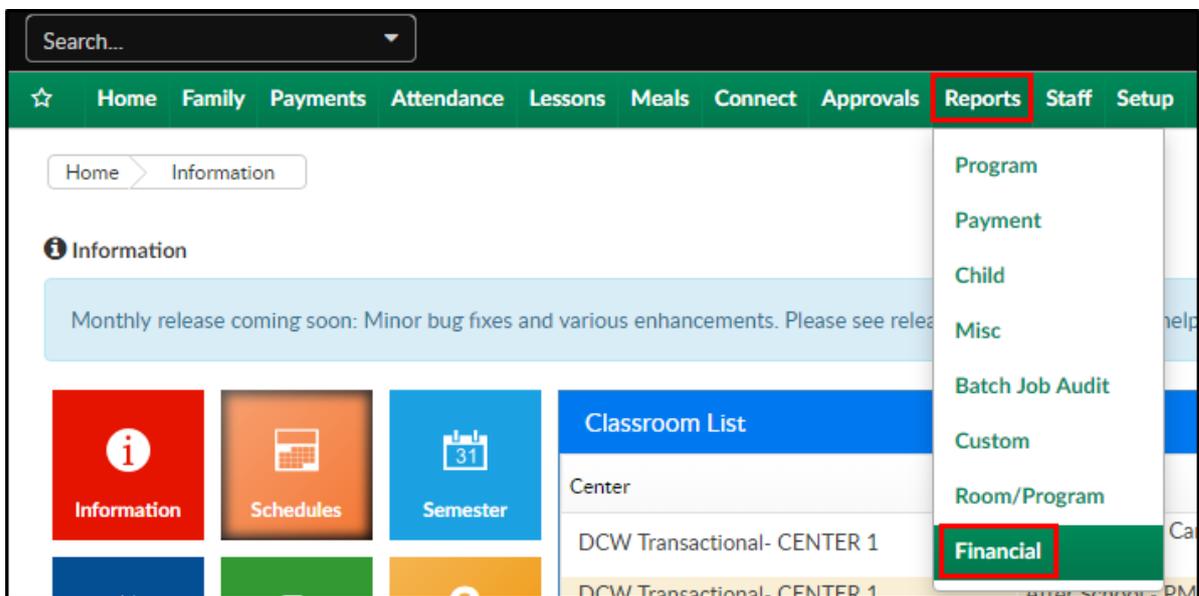
Financial - How to upload payments

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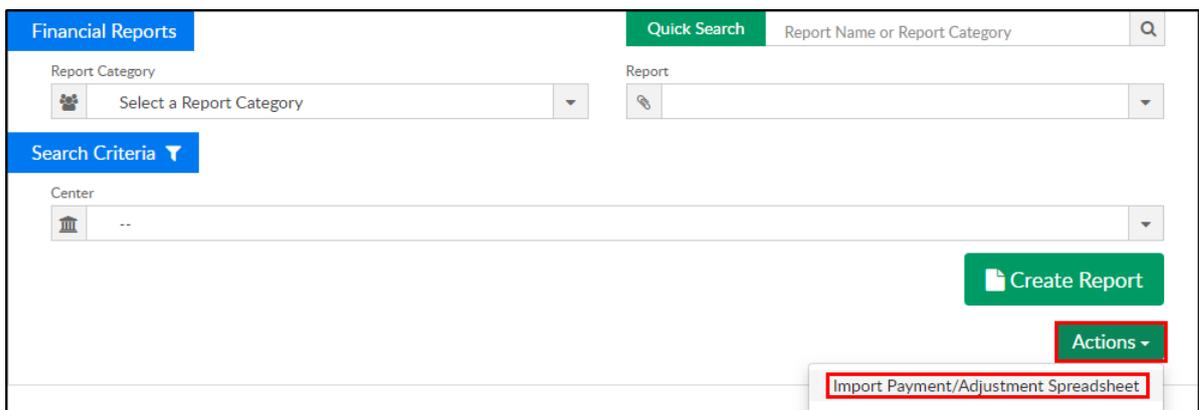
This article is a walk through of how to import payments to family financial ledgers.

Import Payment/Adjustment Process

1. Click Reports, then select Financial



2. Click Actions, then select Import Payment/Adjustment Spreadsheet



3. Click in the Upload a Spreadsheet section to select the file from the computer

4. In the Payment Import section, select Version 5 (ImportPaymentV5.xls )

5. Click Import to add payments to family ledgers

Import Details

Sheet Layout:

Payment Date	Family ID	Payer Name	Batch Number	Payment Notes	Payment Value (Valid Description)	Check Number	Amount
3/28/2019	434898	Export Test	1	Test Note	Payroll Deduction	12345	500

Field details (example):

- Payment Date - enter today's date
- Family ID - enter the Family ID from the system
- Payer Name - enter the parent's Name
- Batch Number - enter the user defined batch number
- Payment Notes - enter any payment detail
- Payment Type - type the name of the payment type

- Check Number - enter the check number, if applicable
 - Amount - enter the total that should be added to the family ledger
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