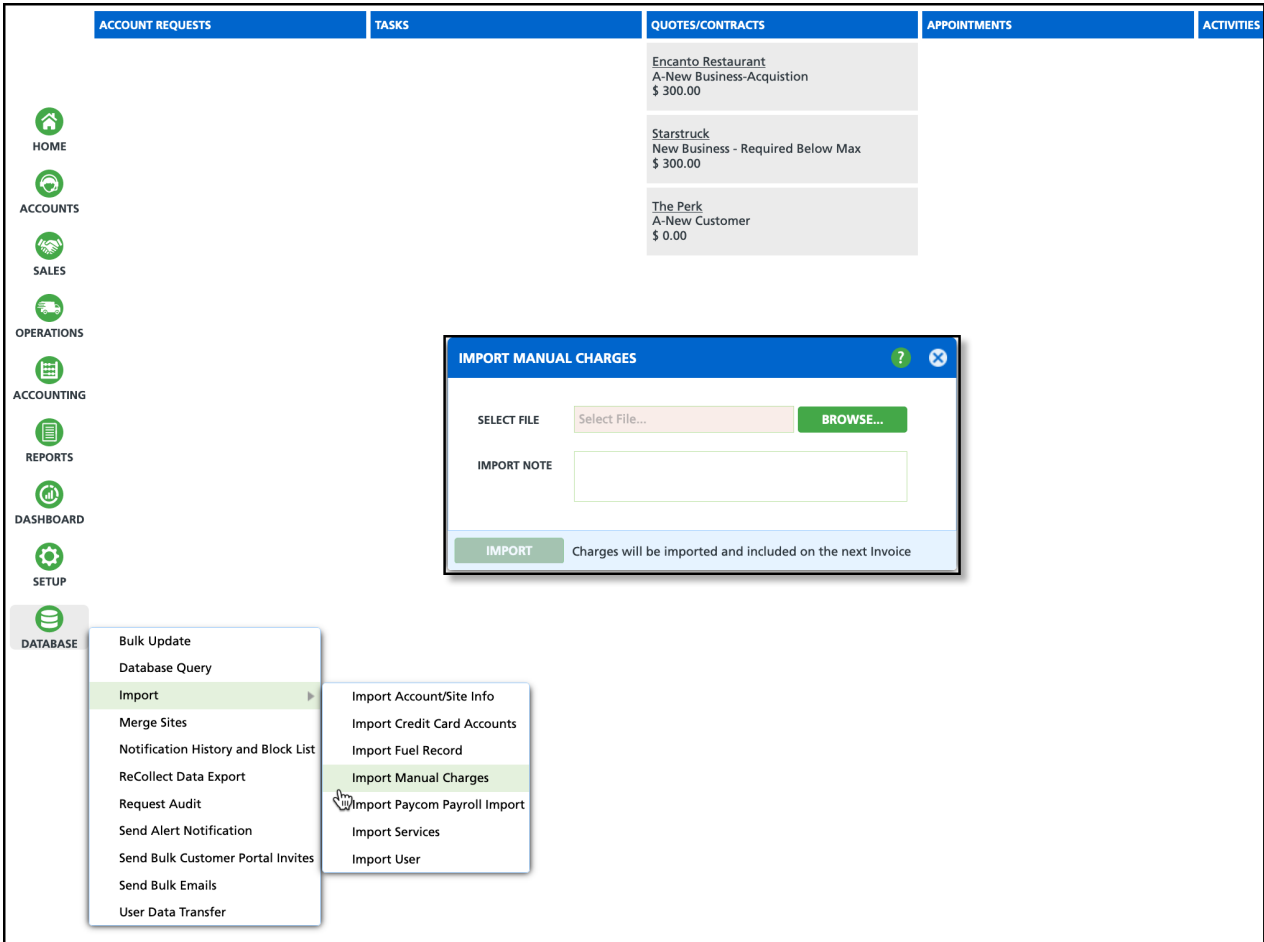


Import Manual Charges

Last Modified on 05/24/2024 1:14 pm EDT

Pathway: Database > Import > Import Manual Charges

The Import Manual Charges feature provides users a method of importing a large amount of manual charges across multiple sites. Once imported, charges are included on the next invoice.



Permission

The following permission is required to use the Import Manual Charges import feature:

Permission ID	Permission Name
456	Import Manual Charges

Logic and File Format Requirements

The following requirements must be met to successfully import manual charges.

Logic

Charge code used in the import file must be available for the division the site is associated.

File Format

File Format: CSV

Date Format: MM/DD/YY

Amount: Must be greater than '0'

	A	B	C	D	E	F	G
1	SiteID	ChargeCode	Quantity	Amount	Date	Note	PONumber
2	18535001	ADJ-CO	1	80	5/24/24	This is a note	12345
3	21198001	ADJ-CO	1	25	5/2/24		112233
4	20440001	Bulk Pickup	2	210	5/24/24	Bin Overflow	221122
5							
6							
7							
8							
9							

Import Notification of Results

No Errors Detected

Once the import is complete, the user will receive a notification on their screen. If there are no errors, a CSV file is not generated for review.

The screenshot shows a notification box at the top that says "NOTIFICATION: Import Manual Charges has completed import of 3 records." Below this, there are three main sections: "QUOTES/CONTRACTS", "APPOINTMENTS", and "ACTIVITIES".

QUOTES/CONTRACTS:

- Encanto Restaurant
A-New Business-Acquisition
\$ 300.00
- Starstruck
New Business - Required Below Max
\$ 300.00
- The Perk
A-New Customer
\$ 0.00

ACTIVITIES:

Today

- 10:17 am Site Viewed
- 10:15 am Site Viewed
- 10:14 am Site Viewed
- 10:09 am Site Viewed

Wed 05/22/24

- 11:57 am Site Viewed
- 8:33 am Site Viewed
- 8:17 am Site Viewed

Errors Detected

Once the import is complete, the user will receive a notification on their screen. If the import contains errors, a confirmation popup will appear. Upon selecting 'Yes,' a CSV of the import is generated with additional columns: Rejection Reason and Status.

	A	B	C	D	E	F	G	H	I
1	SiteID	ChargeCode	Quantity	Amount	Date	PONumber	Note	Rejection Reason	Status
2	18535001	ADJ-CO	1	80	5/24/24	12345	This is a note		Success
3	21198001	ADJ-CO	1	25	5/2/24	112233			Success
4	20440001	Bulk Pickup	2	210	5/24/24	221122	Bin Overflow	Invalid Charge Code Bulk Pickup	Failure
5									
6									
7									
8									
9									

CONFIRMATION

There are some errors in imported Data. Do you want to view the results of Manual Charges Import ?

YES NO

View Results on Customer Service Screen

On the Customer Service screen, the imported manual charge will appear in the Pending section and on the Customer Service Calendar. If edits are needed, click on the charge to open the Add/Edit Manual Charge popup editor.

The screenshot displays the Customer Service interface. At the top, a 'HIGHLIGHTS' section shows a warning: 'Account is significantly past due'. A red arrow points from this warning to a 'PENDING' section which lists a charge: '\$ 60951 Adjustment-Commercial Aliena Somers 05/24/2024 Amount: \$ 210.00, Note: 221122'. Below this, the 'ACTIVE SERVICES (1)' section shows 'Standard' with a 'TOTAL RECURRING \$ 114.45'. The main area is a calendar for May 2024. The calendar shows events for '1, FL_SERVICE, 2YD, MSW' on various dates. A red arrow points from the 'Billing/AR question' event on May 23 to a popup window. The popup window contains the following information:

- Billing/AR question
- Adjustment-Commercial
- 1, FL_EXTRAPU, 2YD, MSW
- (1 views) - Aliena Somers