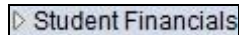


Group Data Entry

1. Click the **Student Financials** link.



2. Click the **Charges and Payments** link.



3. Click the **Group Processing** link.



4. Click the **Create Group Data Entries** link.




5. To create a new group of IDs for group posting, click the **Add a New Value** tab.



6. Never attempt to enter a value in the **Group ID** field. **NEXT** is the correct value at the start of the procedure.

Click the **Add** button.



7. Click the **Group Type** list.



8. Click the appropriate item from the list.

9. Click the lookup icon for the **Origin ID** field and select the appropriate item from the **Look Up Origin ID** list.

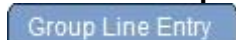
10. Click the **Balance Group** option.

11. The **Control Total** is the total amount of the entire group (number of IDs X the charge per ID.)

Enter the desired information into the **Control Total** field.

12. Enter the total number of IDs being processed into the **Balance Group** field.

13. Click the **Group Line Entry** tab.



14. Enter the first ID into the **ID** field.

15. Select the correct **Account Type** from the dropdown list.

16. Enter the **Item Type** associated with the charge you are posting into the **Item Type** field.

If you have questions/requests regarding **Item Types**, you should send them to DESSFPS@smu.edu.

17. Enter the charge amount into the **Amount** field.

18. Select the appropriate **Term** from the dropdown list. The **Term** should be the current term or the term to which the charge is related.

19. The **Ref Nbr:** field is an informational field for your use. Since there can be many entries on an account with the same item type, you should enter any information that will allow you to identify a specific charge. An example would be the ticket number for a parking citation. This is especially helpful when reversing a charge.



For this example, "Faculty parking lot F" was entered.

The **Item Effective Date** defaults to the current date and should not be changed unless the incident occurred at an earlier date. Examples are health center visits or library fines which should be entered with the date they occurred. Since the **Item Effective Date** that was entered on the first row defaults to all additional rows, you may need to change the **Item Effective Date** on the individual rows.

The **Item Effective Date** should **NEVER** be changed to a future date.

NOTE: Do **NOT** change the **Due Date** or other fields on this page.

20. To add additional IDs to the group, click the **Add a new row at row 1** button to insert a new row.

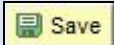
All data except the ID will be carried over from the previous page.

The **Item Type** may be changed but it must be related to the same **Account Type**.



21. Enter the next ID into the **ID** field.
22. Continue inserting new rows and entering IDs.

When all IDs have been entered, click the **Save** button.



23. **End of Procedure.**