ENTER MODIFY A CHARGE FOR A GROUP

The following steps will walk you through the process of reversing a charge for an individual student.

NAVIGATION

Log into myUFL and navigate to:

NavBar > Main Menu > Student Information Systems > Student Financials > Charges and Payments > Group Processing > Create Group Data Entries

1. Click the **Add a New Value tab.**
2. In the Business Unit field, enter **UFLOR**.
3. Click the **Add** button.
4. From the Group Type drop down menu, select **Charge**.

5. Enter the **Origin ID**.

Business Unit UFLOR

*Group Type Charge ▼

*Origin ID 🔍

Original Group ID

☐ Create New Charge Item

6. Check the box next to **Balance Group**.

☑ Balance Group

7. Enter the **Control Total**.

Control Totals

☑ Balance Group

Control Total   100.00   USD

Entered Total   0.00

Difference   0.00

Posted Total   0.00

Posted Date   05/15/2018

8. Enter the **Control Count**.

Control Totals

☑ Balance Group

Control Total   100.00   USD   Control Count   0

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

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10. Enter the **ID number**.

11. Enter the **Account type**.
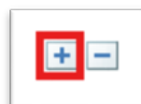12. Enter the **Item Type**.
13. Enter the **Item Amount**.

14. Enter the **Term**.
15. Enter the **Reference Number**.
16. Click **Add**.
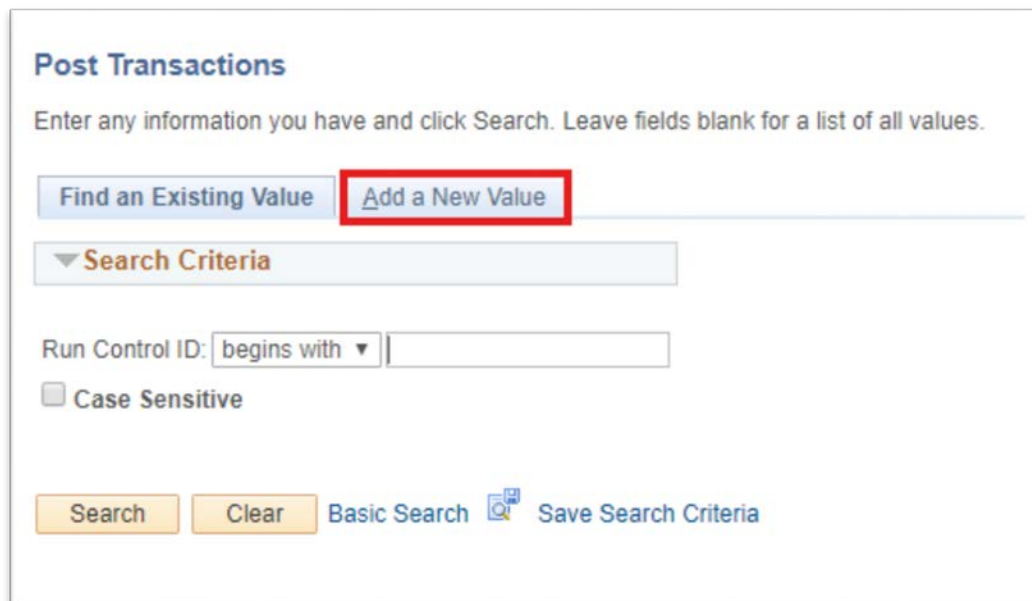17. To add another line, click the **Plus** icon.

18. Enter the **ID number**.

Group Line Number 999999

ID 🔍

Balance 0.00

19. Click **Save**.
20. Click the **Group Entry tab**.
21. Click **Save**. Once your click save, the Group ID is created.
22. Click the **Add a New Value** tab.

Post Transactions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

Run Control ID: begins with ▼ |

☐ Case Sensitive

Search | Clear | Basic Search 🔍 Save Search Criteria

23. Enter the **Run Control ID**.

24. Click **Add**.
25. Enter the **Business Unit**.

26. Enter the **Group Type**.
27. Enter the **Starting Group ID.**
28. Enter the **Ending Group ID**.
29. Click **Run**.

30. Check the **box** next to the transaction you want to monitor.

31. Click **Ok**.
32. Click **Save**.

33. Click Process Monitor.

Post Transactions

Run Control ID: Test_Group   Report Manage | Process Monitor | Run

Process Instance: 173192
Go to Process Monitor

Parameters

Business Unit UFLOR   University of Florida

Group Type C   Charge

Starting Group ID 000000000000071

Ending Group ID 000000000000071

Operator ID

Assigned to Operator ID   Reset Process Instance

Save   Notify   Add   Update/Display

34. Verify that the transaction appears.

Process List   Server List

View Process Request For

User ID 63354650   Type   Last   1 Days   Refresh

Server   Name   Instance From   Instance To

Run Status   Distribution Status   ☑ Save On Refresh

Process List   Personalize | Find | View All | 🗗 | 🖩   First ◀ 1 of 1 ▶ Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	173192		PSJob	SFGRPEIP	63354650	05/15/2018 10:07:49AM EDT	Processing	N/A	Details

Go back to Post Transactions

Save   Notify

Process List | Server List

POST THE TRANSACTION

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The following steps will walk you through of posting the reversed charge.

NAVIGATION

Log into myUFL and navigate to:

NavBar > Main Menu > Student Information Systems > Student Financials > Charges and Payments > Group Processing > Review Transactions

1. Enter the **Run Control ID**.

2. In the Business Unit field, enter **UFLOR**.
3. In the Group ID number field, enter the **Group ID number**.
4. Click **Search**.
5. Click **Group Post Details**.

6. The transaction will show as posted.