

## 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**.

The screenshot displays the 'Group Data Entry' interface. At the top, there is a navigation bar with 'Home' and 'Group Data Entry'. Below this, there are tabs for 'Group Entry' and 'Group Line Entry'. The main form area includes fields for 'Business Unit' (UFLOR) and 'Group ID' (NEXT). A dropdown menu for '\*Group Type' is open, with 'Charge' highlighted. Other fields include '\*Accounting Date' (05/15/2018), '\*Received' (05/15/2018), '\*Entry Date' (05/15/2018), 'Operator' (63354650), and 'Assign To'. There are also sections for 'Control Totals' (Balance Group, Control Total, Entered Total, Difference, Posted Total, Posted Date) and 'Effective Status' (Edit Status, Deposit Balance, Posting Action, Posting Status). Buttons for 'Save', 'Notify', 'Add', and 'Update/Display' are visible at the bottom.

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

Home

Group Entry Group Line Entry

Business Unit UFLOR Group ID NEXT

\*Group Type Charge

\*Origin ID 00020 bookstore

Original Group ID

Create New Charge Item

10. Enter the **ID number**.

Group Line Number 999999

ID

Balance 0.00

11. Enter the **Account type**.

12. Enter the **Item Type**.

13. Enter the **Item Amount**.

Account Type BUS

Item Type 301000000001

Item Amount 50.00

Term 2181 Spr 2018

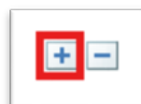
Reference Number

14. Enter the **Term**.

15. Enter the **Reference Number**.

16. Click **Add**.

17. To add another line, click the **Plus** icon.

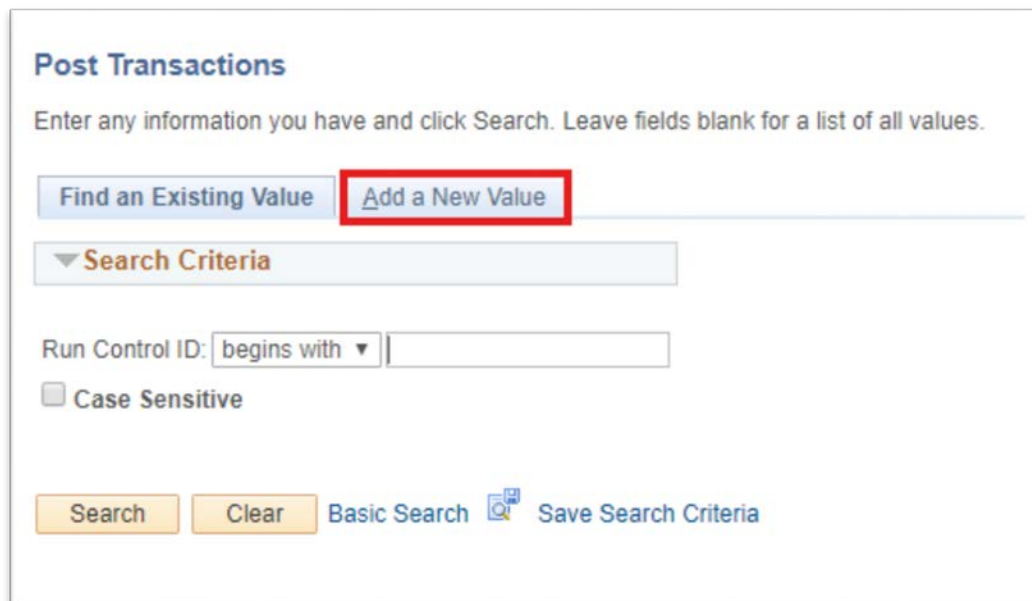


18. Enter the **ID number**.



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**.

**Post Transactions**

Find an Existing Value Add a New Value

Run Control ID: Test\_Group

Add

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

**Post Transactions**

Run Control ID: Test\_Group Report Manager Process Monitor Run

**Parameters**

Business Unit UFLOR

Group Type

Starting Group ID

Ending Group ID

Operator ID

Assigned to Operator ID

Reset Process Instance

Save Notify Add Update/Display

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

Post Transactions

Run Control ID: Test\_Group      Report Manager   Process Monitor   **Run**

**Parameters**

Business Unit  University of Florida

Group Type  Charge

Starting Group ID

Ending Group ID

Operator ID

Assigned to Operator ID

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

Process Scheduler Request

User ID 63354650      Run Control ID Test\_Group

Server Name       Run Date

Recurrence       Run Time      

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Group Post/CRM EIP	SFGRPEIP	PSJob	(None) ▼	(None) ▼	Distribution
<input type="checkbox"/>	Group Posting Common ID Create	SFGRPDR	COBOL SQL	(None) ▼	(None) ▼	Distribution
<input type="checkbox"/>	Group Posting Process	SFGRPST	COBOL SQL	(None) ▼	(None) ▼	Distribution

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  University of Florida

Group Type  Charge

Starting Group ID

Ending Group ID

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  Type  Last  1 Days [Refresh](#)

Server  Name  Instance From  Instance To

Run Status  Distribution Status   Save On Refresh

Process List									
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	173192		PSJob	SFGRPEIP	63354650	05/15/2018 10:07:49AM EDT	Processing	N/A	<a href="#">Details</a>

[Go back to Post Transactions](#)

[Save](#) [Notify](#)

[Process List](#) | [Server List](#)

## POST THE TRANSACTION

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**.

**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](#)

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



### Review Transactions

Unit UFLOR  
Group ID 000000000000071  
Type C Charge  
Origin ID 00020 Bookstore

**Control Information**

Control Total	100.00	USD
Entered Total	100.00	
Difference	0.00	
Posted Total	100.00	
Posted Date	05/15/2018	

[Group Post Details](#)

First Group Line Nbr 1 Last Group Line Nbr 2

**Group Line Details**

Line Nbr	ID	Name	Term	Item Amt	Account Type	Receipt Number
1	02062630	Alligator, Alberta B	2181	50.00	BUS	Academic Information
2	14141993	Hutchins, Confessa D	2181	50.00	BUS	Academic Information

Return to Search Notify Refresh

6. The transaction will show as posted.

### Group Post

#### Group Post Details

Business Unit UFLOR Operator 63354650  
Group ID 000000000000071 Original Group ID  
Type C Charge Assign To  
Origin ID 00020 Bookstore Accounting Date 05/15/2018

Balance the Group [Approval Information](#)

Control Totals			Control Information	
Control Total	100.00	USD	Control Count	2
Entered Total	100.00		Entered Count	2
Difference	0.00		Difference Count	0
Posted Total	100.00		Posted Count	2
Posted Date	05/15/2018		Received	05/15/2018
			Entry Date	05/15/2018

Edit Status	Deposit Balance	Posting Action	Posting Status
Edited	Balanced	Posted	Balance

Return