

Mass Select Transaction End-to-End Process

Purpose: Use this document as a resource for how to select transactions in mass using ctcLink.

Audience: Student Financials Staff.

❗ You must have at least one of these local college managed security roles:

- ZZ SF Group Processing

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.


1. Mass Select Transaction

Navigation: Student Financials > Charges and Payments > Group Processing > Mass Select Transactions

1. The Mass Select Transactions run control search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
 - NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_ADM_FYR_5 (Admissions Letter, Summer, FYR Admit Type).
3. The Mass Select Transactions page displays.
4. In the **Parameters** section, enter, search, or select the:
 - A. **Business Unit.**
 - B. **Group Type.**
 - C. **Origin ID.**
 - D. **Type of Group:**
 - I. **Student Group** or
 - II. **External Org Group.**
 - E. **Transaction Type:**
 - I. **Charges,**

- II. **Payments**, or
 - III. **Reversals**.
- F. Deselect the **Balance the Group** checkbox.
- G. *Optional*:
- I. Control Total.
 - II. Control Count.
5. In the Population Selection section, select the **Selection Tool** drop-down.
- A. Select the method for gathering a population:
 - I. **Equation Engine**: Not recommended.
 - II. **External File**: See the *File Mapping* section below.
 - III. **PS Query**.

File Mapping


 When using an external file, the file must be saved on your computer in the **.CSV (Comma Delimited)** file format.

It is recommended that the file should have at minimum the:

- Student/Corporate ID Number
- Item Type
- Item Amount

1. When the Selection Tool is populated with External File in the Population Selection section, the File Mapping and File buttons appear.
2. Select the **Upload File** button and the File Attachment pop-up opens.
 - A. Select the **Choose File** button and the File Explorer pop-up opens.
 - I. Search or select your file and select the **Open** button.
 - B. Select the **Upload** button and the Mass Select Transactions page displays.
3. Enter or search for the **File Mapping** or select the **Create File Mapping** link.
 - A. If you select the **Create File Mapping link**, the Population Selection File Map page displays.
 - I. In the **File Mapping Definition** section:
 - a. Enter the **File Mapping** name. Leave the **Public** checkbox deselected.
 - b. Select **Delimited** from the **File Type** drop-down.
 - c. Select **Comma** from the **Field Delimiter** drop-down.
 - d. Select the **Header Row** checkbox if your file has a header row.
 - i. Enter the **Header Row Number**. This is likely the number **one (1)**.
 - II. In the **Field Mapping** section:
 - a. Enter the **Field Number** for the appropriate **Field Name**.

- III. Select the **OK** button and the Mass Select Transactions page displays.
4. Select the **Preview Selection Results** link to verify your file mapping is correct. If not, select the **Edit File Mapping** link to make the appropriate changes.

 The Field Number will be the columns from the .CSV (Comma Delimited) file you are uploading. If you have a header row, that will be the 'A' row from your file. For example, you have a header row at the top of your file. The header row will be Field Number 1. You have five columns which include the Unit, ID, Name, Item Type, and Item Amount in that order. The Unit will be Field Number 1, the ID will be Field Number 2, the Name will be Field Number 3, and so on.


Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

View Tutorial Via Panopto

View the external link to [File Mapping](#). This link will open in a new tab/window.

6. In the **Line Details** section:
- A. Complete only the remaining fields in the **Line Details** section that will apply to *all of the items* within the spreadsheet. The fields within the **Line Details** section will overwrite the information contained in the spreadsheet being uploaded if populated.
 - I. Be sure to *not populate* fields within the **Line Details** section that will be uploaded from the spreadsheet.
 - II. For PSQuery this would be modifying the Unique Field Name to match the field in question. **Example: ITEM_AMT for field Item Amount**
 - III. When entering charges, always enter in the **Due Date**.
7. Select the **Run** button. Please refer to the [Process Schedule Request](#) steps for further instructions.
8. Section complete.

 The **Account Type** field is required to be populated for the successful processing of Mass Select Transactions.

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2. Review Group Data Entry

Navigation: Student Financials > Charges and Payments > Group Processing > Create Group Data Entries

1. The Create Group Data Entries Find an Existing Value page displays.
2. Enter the **Business Unit** and select the **Search** button.
3. The Search Results display.
4. Select the appropriate **Group ID** link and the Group Entry tab displays.
5. Within the Effective Status section on the Group Entry tab, select Available for Posting in the Posting Action drop-down.
6. This file can be drilled into and then Saved.
7. Copy the Group ID Number for the following Group Post Transaction process.
8. Section complete.


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View Tutorial Via Panopto

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3. Post Group Transactions and Review Errors

 You can verify the success of the process by navigating to the Customer or Corporate Account. Please refer to the [View Customer Accounts](#) QRG for verifying student posting.

Please refer to the [Post Group Transactions and Review Errors](#) QRG.

4. Correct and Post Group Transactions

Please refer to the [Correct and Post Group Transactions](#) QRG.