

Create and Post a Group Data Entry

Purpose: Use this document as a reference to create a group data entry to process multiple transactions for a group of students in 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.

Create a Group Data Entry

❗ Only enter transactions with the same item type classification in a given group data entry e.g. charges, payments, financial aid, etc. **Do not** use group processing to post refunds or waivers. Entering refunds through group processing does not update the related refund records and refund reversals are not processed correctly. Waivers should only be applied through tuition calculation to ensure they are processed correctly.

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

1. The Group Data Entry search page displays.
2. Select the **Add a New Value** tab.
 - a. Enter the **Business Unit**.
 - b. Group ID is grayed out and will default to NEXT.
3. Select the **Add** button the Create Group Data Entries page displays and defaults to the **Group Entry** tab.
4. Select the **Group Type** that describes the transactions from the drop-down.
5. Enter or search for the **Origin ID** that is the source of the transactions.
6. If the dates should differ from the defaulted current date, update the **Accounting Date**, **Received**, and **Entry Date**.
7. *Optional:* In the Control Totals section:

- a. Select the **Balance the Group** checkbox if the total of transactions should be equally balanced for all students. This is not recommended.
 - b. Enter the **Control Total** which is the sum of all transactions to be posted through this group.
 - c. Enter the **Control Count** which is the count of all transactions to be posted through this group.
8. In the **Effective Status** section, ensure that **Available for Posting** is selected from the **Posting Action** drop-down.
 9. Select the **Group Line Entry** tab and the Group Line Entry page displays.
 10. In the Group Line Details section, enter or search for the:
 - a. **ID**.
 - b. **Account Type**.
 - c. **Item Type**.
 - d. **Item Amount**.
 - e. **Term**.
 - f. *Optional*:
 - a. **Reference Number**.
 - b. Update **Item Effective Date** if the date should differ from the defaulted current date.
 - g. **Due Date** if this is a charge item type being processed.
 11. The Payment Information section is currently utilized for Dual Processing. Refer to the [Dual Processing ONLY - Create/Post a Group Data Entry](#) QRG for additional processing information.
 12. Select the **Add a New Row [+]** button to insert a new row to enter additional transactions. Repeat Step 10 as necessary.
 13. Select the **Save** button.
 14. Copy or make note of the **Group ID** number.
 15. Section complete.

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 [Create a Group Data Entry](#). This link will open in a new tab/window.

Post a Group Transaction

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