Edit Transactions

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Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review **User Permissions for Edit Transactions**.

Transactions can be edited individually using the pencil icon the transaction grids. Groups of transactions can be edited from the results of a **transactions search**.

You can choose which users have permission to edit or delete transactions. All users with this ability should be aware of how either task can affect a family's account. It is best to <u>edit</u> a transaction rather than delete it. However, if the transaction was created in error, deleting is appropriate. Transactions can be restored - contact Customer Support for assistance.



Use caution when editing transactions as it can cause discrepancies with information already transferred to your accounting system, e.g. exported to QuickBooks.

Expand each section below for more information on editing transactions.

Editing Rules

To protect important data, not all fields in a transaction can be edited and there are restrictions on when the amount field of a fee or payment can be changed.

- The *amount* of a fee transaction cannot be edited if it is is inked to a payment. Unlink the payment from the fee to make your edit and then relink it.
- The *amount* of a payment transaction cannot be edited if it has been applied to fees. Unlink the fees to make your edit and then re-apply the payment.
- The amount of a refunded payment transaction cannot be edited.
- For ePayments, the following fields cannot be edited:Location, Transaction Date, Transaction Type, Amount, Payment Method, Check #, Credit Card Last 4, or Date Paid.
- For payments and refunds the following fields cannot be edited: *Transaction Date*, *Transaction Type*.

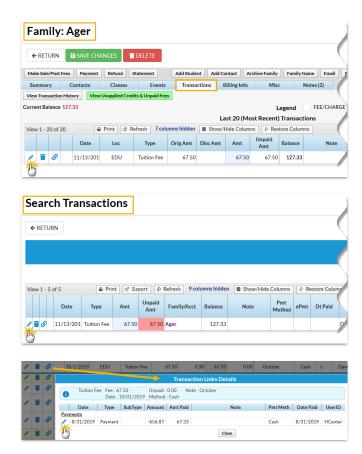
Edit a Single Transaction

Using the pencil (icon) 🧪 to edit a single transaction from any of these options:

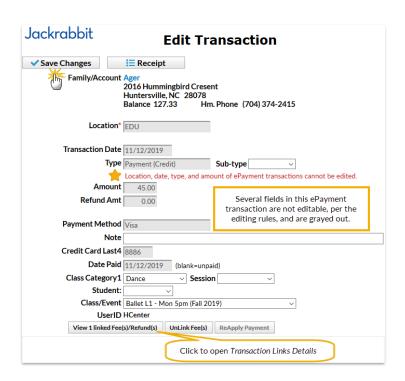
• Family record > Transactions tab

• Search Transactions from the Transactions menu

 Transaction Links Details, o, in transaction grids and in Edit Transaction modal



In the *Edit Transaction* modal, make your changes keeping the editing rules (section above) in mind. Be sure to **Save Changes**.

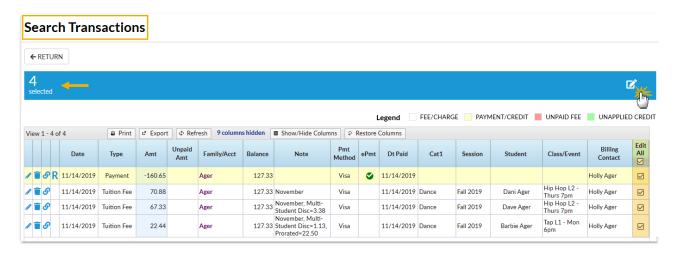


Edit Multiple Transactions (Mass Edit)

From **Search Transactions**, in the *Transactions* menu, it is possible to edit multiple transactions at once.

From the search results, an **Edit All** column allows you to select multiple transactions to edit (using the checkbox) or to edit all transactions by selecting the checkbox in the *Edit All* column header.

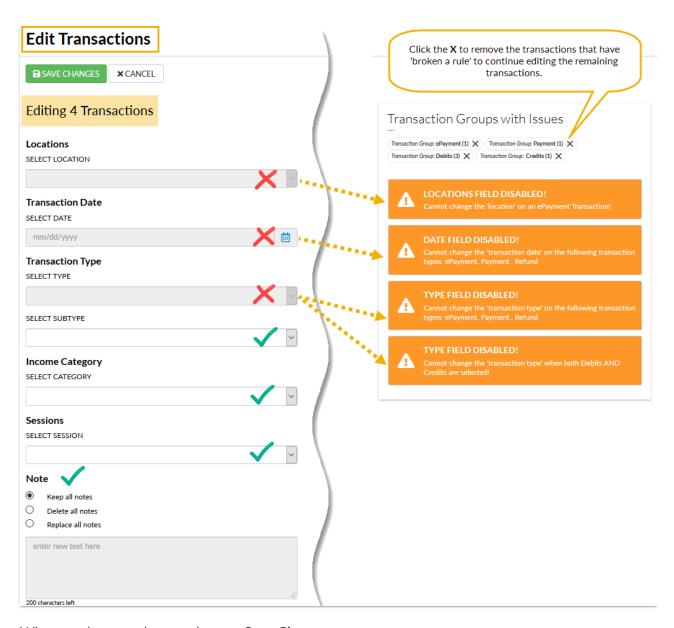
When you have selected one or more transactions, the Mass Edit icon and the number of transactions to be edited display in the selections bar.



The Edit Transactions window will display:

- The number of transactions to be edited
- Fields that are not editable are grayed out
- An explanation of which editing rules were broken

In the *Transaction Groups with Issues* section, use the **X** to remove any transactions that have 'broken a rule' to open up the grayed out fields and continue editing the remaining transactions.



When you have made your changes, Save Changes.

You will be prompted to confirm your changes. Click**Yes**, **I'm Sure** to confirm and be returned to the Search Transactions results where your recently edited transactions will be displayed.

