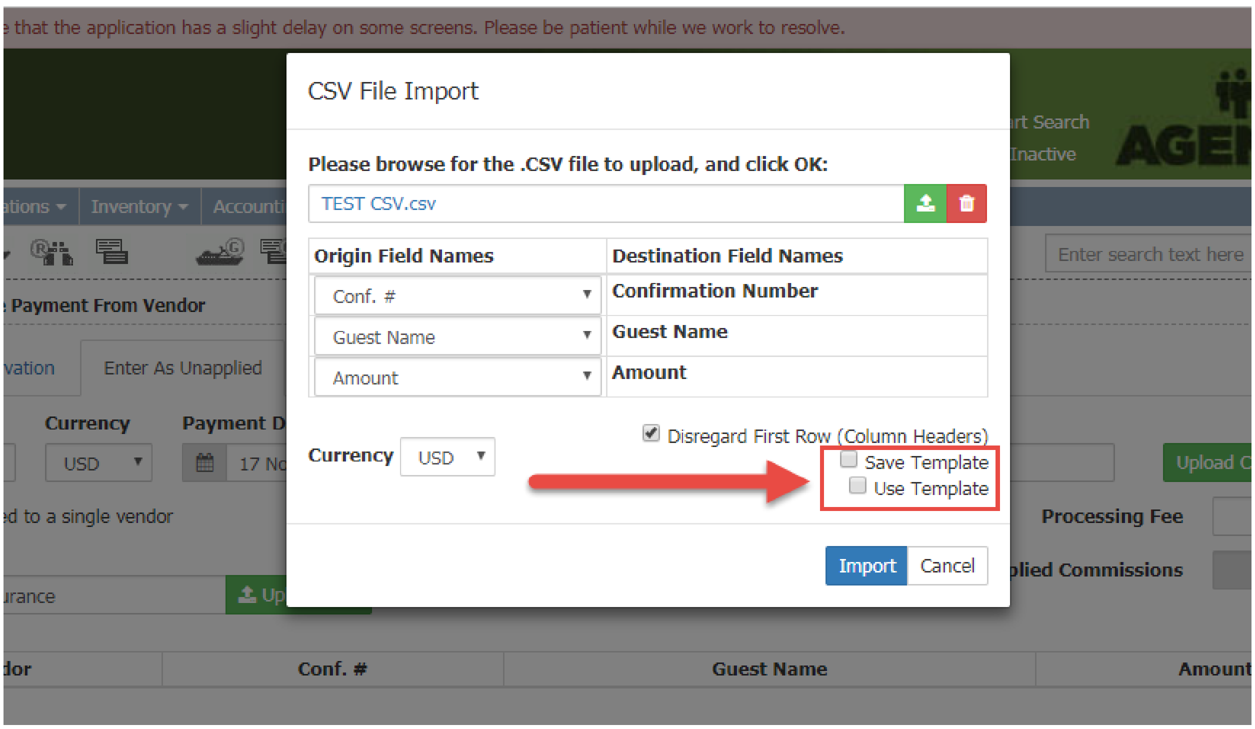
Saving & Using Custom Commission File Import Templates

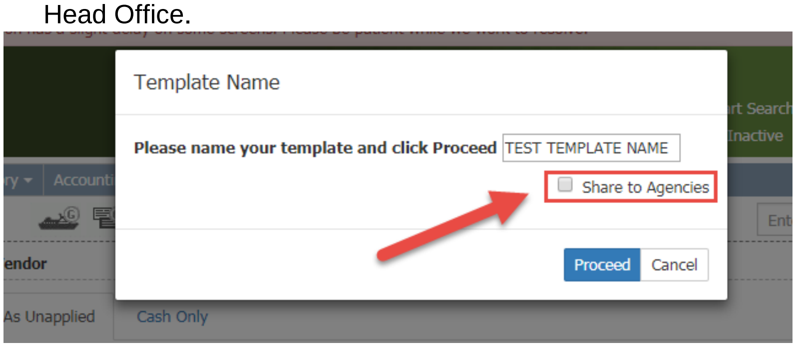
- Upon selecting the csv to upload, there are two new options available above the Import/Cancel buttons: **Save Template** and **Use Template**.
- The **Save Template** option is now available to use after completing the mapping for the *Conf. #, Guest Name*, and *Amount* fields for that file type. Users will be able to select that template to re-use in the future without having to re-map each time.

To Save a Custom File Import Template

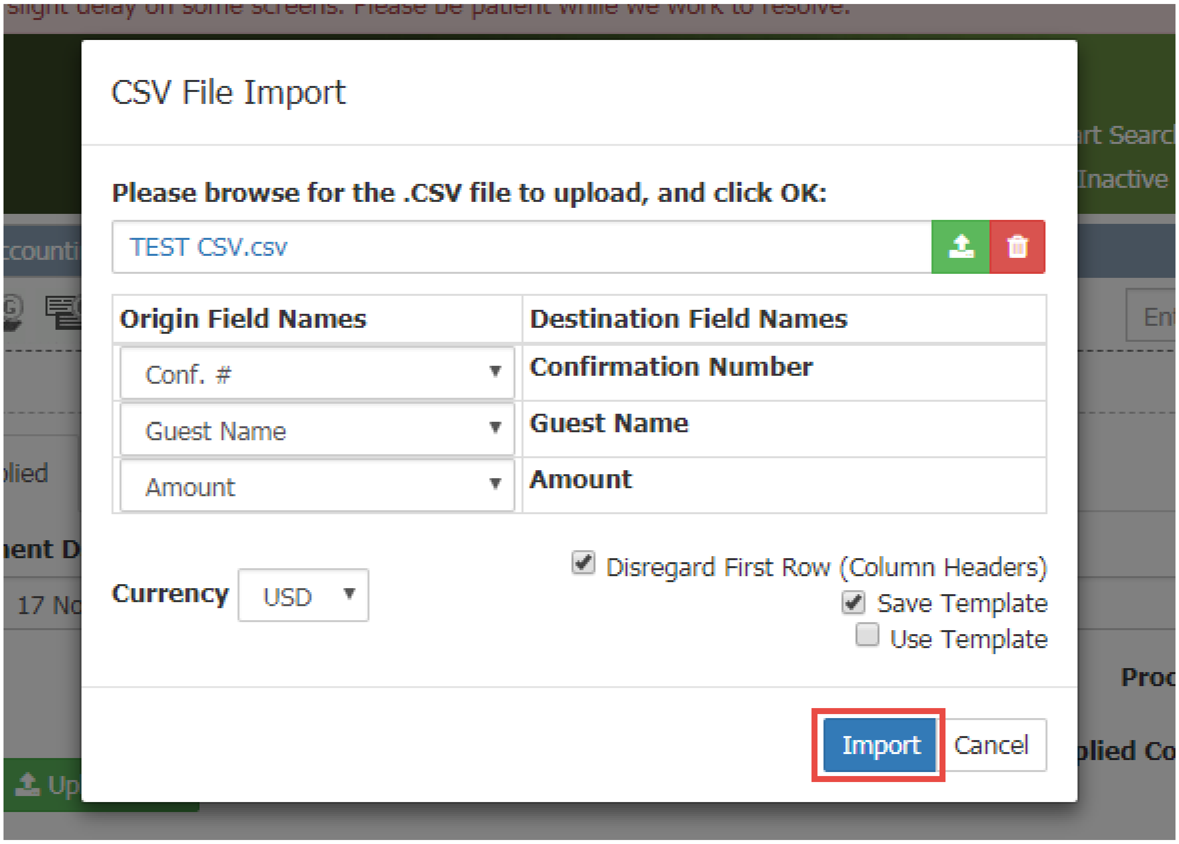
1. Navigate to **Receive Payment from Vendor**; select **Enter as Unapplied**
2. Select **Upload CSV**
3. Locate and select the .CSV file to begin the mapping process
4. Map the **Origin Field Names** with the **Destination Field Names**, as desired
5. To save it as a template, check the box next to **Save Template** and press **Import**



6. You will be prompted to enter a Name for the template; enter the Template Name and press Proceed
    a. It is within this screen that a Head Office user will have the opportunity to check the box to **Share to Agencies.**
    b. Selecting this option will make any saved templates available for all agencies within that Head Office.

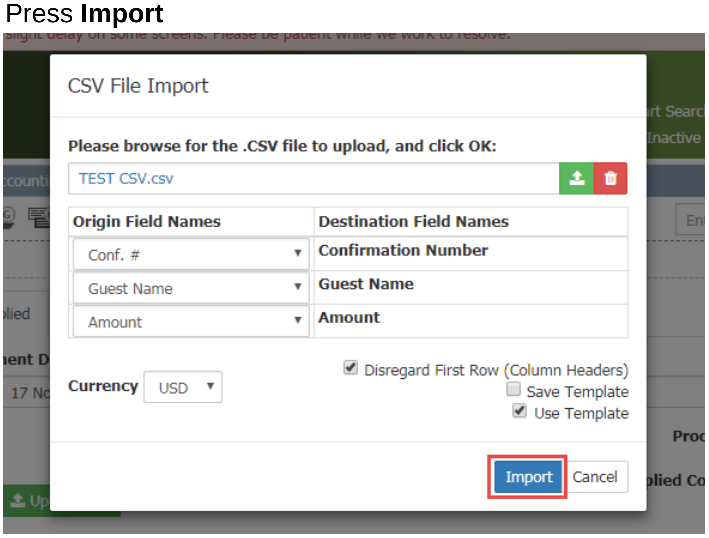


7. Once the name for the template has been saved, you will be returned to the previous screen to complete the Import action. Click **Import** to complete your file upload.

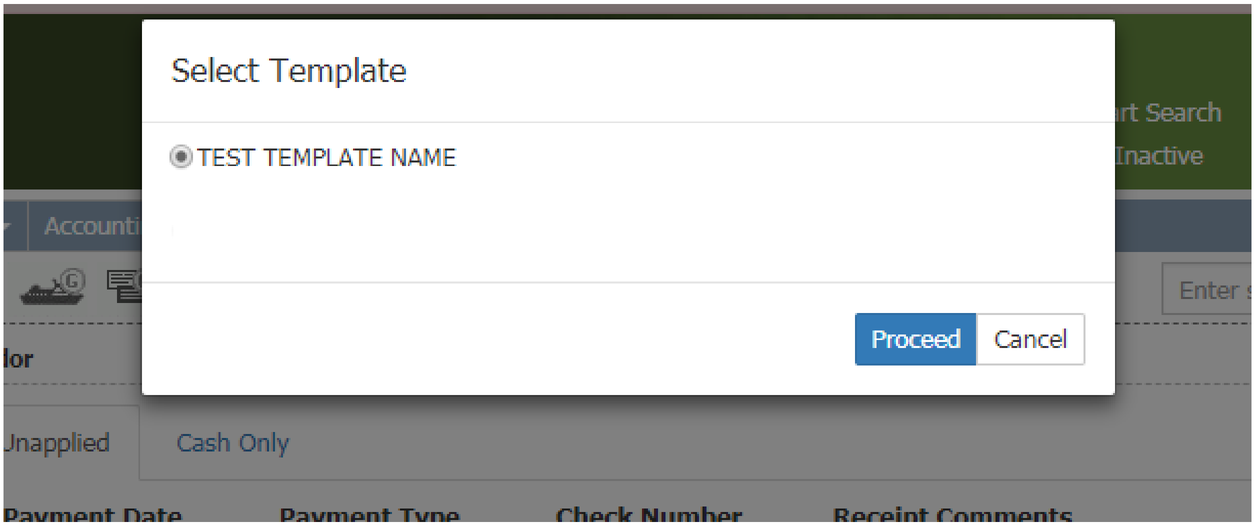


To Use a Previously Saved Custom File Import Template

1. Navigate to **Receive Payment from Vendor**; select **Enter as Unapplied**
2. Select **Upload CSV**
3. Locate and select the .CSV file to begin the mapping process
4. Upon selecting the .CSV file to upload, check the **Use Template** box
5. Press **Import**



6. You will be presented with saved templates available to your Head Office/Agency; Select a Template
7. Press **Proceed**



8. After clicking Proceed, your fields will be mapped according to the template selected.
9. Press **Import** to complete your file upload