

## 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**

that the application has a slight delay on some screens. Please be patient while we work to resolve.

CSV File Import

Please browse for the .CSV file to upload, and click OK:

TEST CSV.csv

Origin Field Names	Destination Field Names
Conf. #	Confirmation Number
Guest Name	Guest Name
Amount	Amount

Currency: USD

☒ Disregard First Row (Column Headers)

☐ Save Template

☐ Use Template

Import Cancel

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.

Template Name

Please name your template and click Proceed: TEST TEMPLATE NAME

☐ Share to Agencies

Proceed Cancel

- 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.

**CSV File Import**

Please browse for the .CSV file to upload, and click OK:

TEST CSV.csv

Origin Field Names	Destination Field Names
Conf. #	Confirmation Number
Guest Name	Guest Name
Amount	Amount

Currency: USD

☒ Disregard First Row (Column Headers)

☒ Save Template

☐ Use Template

**Import** Cancel

### To Use a Previously Saved Custom File Import Template

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

**CSV File Import**

Please browse for the .CSV file to upload, and click OK:

TEST CSV.csv

Origin Field Names	Destination Field Names
Conf. #	Confirmation Number
Guest Name	Guest Name
Amount	Amount

Currency: USD

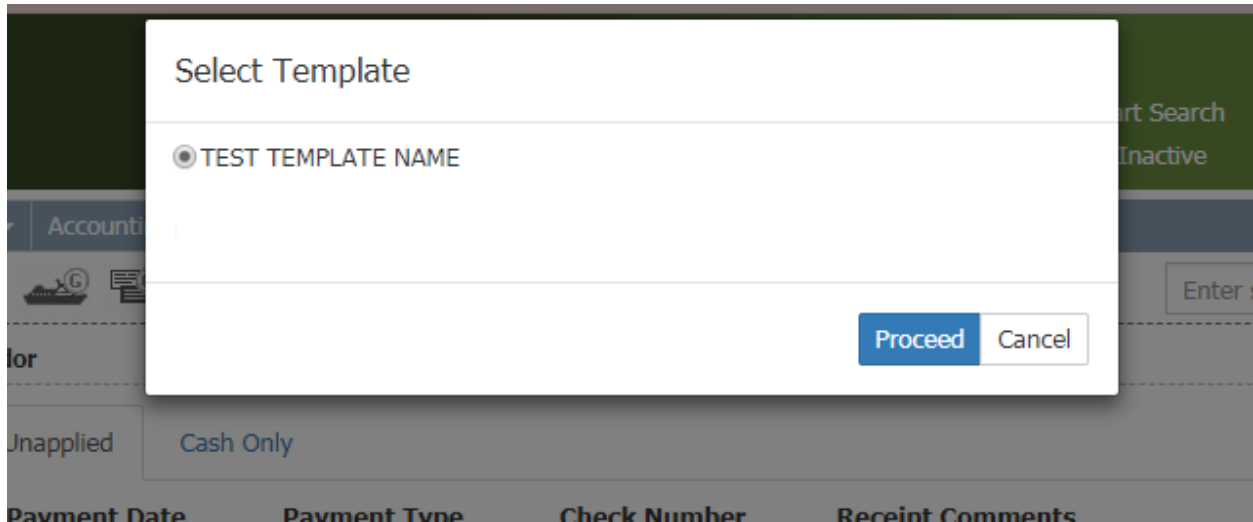
☒ Disregard First Row (Column Headers)

☐ Save Template

☒ Use Template

**Import** Cancel

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