San Francisco Culinary, Bartenders & Service Electronic Contribution Website User Manual

This guide is intended to show you the quick and easy way to enter contributions using your new contributions website. This guide will walk you through the following:

- How to process a new contribution form

- How to process payments via ACH

- How to modify a saved contribution form

- How to upload a file to the electronic contributions site using a CSV File

- How to copy/modify a previous contribution form

- How to view and delete contribution forms

- How to pay multiple saved invoices

Web Address:
www.sfculinaryemployers.org

San Francisco Culinary, Bartenders & Service Employees Trust Funds

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Introduction

You now have the power to access information 24 hours a day, 7 days a week.

To Navigate this site:
- Click on a header on the top. This opens your submenu options.

To Log On:
- There is a login box in the upper right corner.
- Enter your User Name and Password then click on the login button.

If your login was successful you'll be directed to the appropriate page to begin.

If your login was invalid you'll be directed back to the login screen where you will have the chance to try again.

News / Events

No news is available.

- **To log in to this site, you will need to contact the BeneSys office to register, at which point you will be mailed two separate introduction letters. These letters will contain the contractor number and identification number needed for registration. Once you have received your letters, navigate to the website and click on the "Create an Account" option in the top right corner of the website, where you will create a user name and password for your account.**

- **If you have any difficulty when creating your account, please call 844-492-9157 or 415-268-4252, where someone will assist you.**

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Let's Get Started

- **Once you have logged in, to begin entering employee contribution information, mouse over the Electronic Contribution tab and select Process Contribution as shown above.**
  - **This option will allow you to create and process contributions.**

Processing Contributions

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Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: ▇▇▇▇▇▇ INC

Work Start Date: 8/1/2020   **Work End Date:** 8/31/2020

Process Contribution:
```
Enter New Contribution
Modify / Submit Saved Contribution
Upload Contribution File
Copy / Modify Previous Report Form
```

Contribution Type:

CBA: BYE AGREEMENTS   ☐ Report no Hours

Submit   Cancel

- **Enter New Contribution** – This allows manual entry of your contribution form

- **Modify / Submit Saved Contribution** – Allows you to retrieve a previously entered and saved contribution form

- **Upload Contribution File** – Allows you to upload a data file exported from your payroll system (.CSV or .TXT format) directly to the website

- **Copy / Modify Previous Report Form** – This option will allow you to retrieve a previous month's submitted contribution form and copy the information to the current month's contribution form

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Entering a New Form

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Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: ▉▉▉▉▉▉ INC

Work Start Date: 8/1/2020   **Work End Date:** 8/31/2020

Process Contribution: Enter New Contribution

Contribution Type: Regular Contribution

CBA: BTE AGREEMENTS   ☐ Report no Hours

Submit   Cancel

1. Select the <u>Contractor</u>: **If you only submit contributions for one contractor, that contractor will show by default and you won't have other contractors to select from. If you have a login that allows you to submit contributions for multiple contractors, click the drop-down arrow and a list of contractors you submit for will show, from which you can select the desired contractor.**
2. **Select a <u>Work Start Date</u> and <u>Work End Date</u>. If you are a monthly contractor, please use the first day and the last day of the month. If you are a weekly contractor, please use the payroll start and end dates.**
3. **Select <u>Enter New Contribution</u>.**
4. **The contribution type should always be <u>Regular Contribution</u>.**
5. **Select the appropriate <u>CBA</u> based on the work you are reporting. This will pull the fringe rates for that CBA.**
6. **To report no work, please check the "Report no Hours" box.**
7. **Finally, click <u>Submit</u> to begin entry.**

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Enter a New Form - Contribution Entry

- **This screen will typically be prepopulated with employees you have recently remitted for under the CBA you selected. It also allows you to enter new employees as well as delete employees you no longer remit for. To add a new employee, simply enter their SSN and name in the blank line at the end of the form. To delete an employee, check the delete box on that employee's line and click <u>Delete Employee</u>.**
- **Enter the <u>Hours Worked</u> and <u>Flat Rate</u> in the appropriate fields. Enter the banquet employees shifts in the appropriate fields.**
- **Click <u>Save and Complete Later</u> if you need to come back later to finish your contribution entry. This will save what you already input and lets you pick up where you left off.**
- **Once all employees' hours and wages are entered, click on <u>Calculate Contribution</u>, at which point the following screen will show:**

Enter a New Form – Calculate Contributions

- **The <u>View Details</u> link under Contractor Contribution Details will show you a breakdown of all calculated fringes**
  - <mark>**See next page in user guide for option to not pay certain fringes on all employees**</mark>
- **The <u>View Details</u> link under Employee Contribution Details will show you a breakdown of all calculated fringes for that particular employee**
  - <mark>**See page after next in user guide for option to not pay certain fringes on a specific employee**</mark>
- **Use the <u>Back</u> button to return to the prior screen if you'd like to adjust work details for any employee. <u>*At no time*</u> should you use your browser's back button to return to a previous page (back arrow in upper left corner of your browser window). This will cause all previously entered information to be lost.**
- **When all the information you've entered is correct, click the <u>Finalize Contribution</u> button. Note: once you've clicked <u>Finalize Contribution</u>, you cannot go back and make changes.**

Enter a New Form - Contractor Details

Contractor Contribution Details

Contractor Name: HOTEL

Fund Name	Units	Basis	Rates	Amount
Health & Welfare	2.00	Flat Rate	2,284.79000	$4,569.58
Pension DB	2.00	Flat Rate	653.60000	$1,307.20
Banquet	159.00	Hours Worked	0.01500	$2.39
Legal	159.00	Hours Worked	0.15000	$23.85
Monthly Education Fund	2.00	Flat Rate	0.50000	$1.00
ELDER DEP CARE	159.00	Hours Worked	0.24000	$38.16
DISABILITY	2.00	Flat Rate	0.00000	$0.00
VAC	2.00	Flat Rate	1.56000	$3.12
Hourly Education Fund	159.00	Hours Worked	0.02000	$3.18
DEP COPAY	2.00	Flat Rate	0.00000	$0.00
				Total: $5,948.48

Close

- **IF FEATURE APPLICABLE: To elect to not pay an optional fringe for ALL EMPLOYEES, click on the <u>View Details</u> link under Contractor Contribution Details next to the Work Class for which you would like to not pay the optional fringe.**
  - **Check the <u>Overwrite</u> box next to fringe(s) you are not paying.**
  - **Click <u>Save</u>, which will overwrite the fringe amount to $0.**
  - **When overriding a fringe at the contractor level, the amount contributed for that fringe cannot be changed.**

Note: You should only use this option if you have a signed agreement that states you do not have to pay a specified fringe. All forms are checked when they are submitted and if you do not pay a fringe you are required to pay, you may be assessed liquidated Damages.

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Enter a New Form - Contractor Details

Employee Contribution Details

First Name: JANE   **Last Name:** DOE

Fund	Units	Basis	Rate	Amount
Banquet	67.00	Hours Worked	0.01500	$1.01
Legal	67.00	Hours Worked	0.15000	$10.05
ELDER DEP CARE	67.00	Hours Worked	0.24000	$16.08
Hourly Education Fund	67.00	Hours Worked	0.02000	$1.34
Health & Welfare	1.00	Flat Rate	2,284.79000	$2,284.79
Pension DB	1.00	Flat Rate	653.60000	$653.60
Monthly Education Fund	1.00	Flat Rate	0.50000	$0.50
DISABILITY	1.00	Flat Rate	0.00000	$0.00
VAC	1.00	Flat Rate	1.56000	$1.56
DEP COPAY	1.00	Flat Rate	0.00000	$0.00
				Total: $2,968.93

Close

- **IF FEATURE APPLICABLE: To elect to not pay an optional fringe for ONE EMPLOYEE, click on the <u>View Details</u> link under Employee Contribution Details next to the employee for whom you would like to not pay the optional fringe.**
  - **Check the <u>Overwrite</u> box next to fringe(s) you are not paying.**
  - **In the amount field for the fringe that is to be overwritten, enter 0.00, or whatever the correct dollar amount is.**
  - **Click <u>Save</u>, which will overwrite the fringe amount to $0 or the amount you entered.**

Note: You should only use this option if you have a signed agreement that states you do not have to pay a specified fringe. All forms are checked when they are submitted and if you do not pay a fringe you are required to pay, you may be assessed liquidated Damages.

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Enter a New Form - Finalize Contributions

Contribution Batch

Contractor Name:	HOTEL		**Contractor Number:**	123
Batch Number:	CW23-00000008		**Work End Date:**	06/30/2023
CBA:	AGREEMENT			

INVOICE # CW23-00000005

Your Calculated Contributions for work ending 06/30/2023:	$5,948.48
Remittance Amount Due:	$5,948.48
Invoice #:	CW23-00000005 * PLEASE WRITE THIS INVOICE NUMBER ON THE CHECK THAT YOU MAIL AND PLEASE BE SURE TO INCLUDE A COPY OF THIS INVOICE WITH YOUR CHECK(S).
Invoice Date:	07/11/2023

[Pay Now]   [Print Invoice]   [Done]

Amount Due:

Work Class	Fund	Fund Code	Hours Worked	Flat Rate	Week 1 Shifts	Week 2 Shifts	Week 3 Shifts	Week 4 Shifts	Week 5 Shifts	Calc Hrs	Basis	Rate	Amount
Default Work Classification	Health & Welfare	H&W	159.00	2.00	0.00	0.00	0.00	0.00	0.00	2.00	Flat Rate	2,284.79000	$4,569.58
Default Work Classification	Pension DB	DB	159.00	2.00	0.00	0.00	0.00	0.00	0.00	2.00	Flat Rate	653.60000	$1,307.20
Default Work Classification	Banquet	IBC	159.00	2.00	0.00	0.00	0.00	0.00	0.00	159.00	Hours Worked	0.01500	$2.39
Default Work Classification	Legal	LGL	159.00	2.00	0.00	0.00	0.00	0.00	0.00	159.00	Hours Worked	0.15000	$23.85
Default Work Classification	Monthly Education Fund	EDM	159.00	2.00	0.00	0.00	0.00	0.00	0.00	2.00	Flat Rate	0.50000	$1.00
Default Work Classification	ELDER DEP CARE	DEP	159.00	2.00	0.00	0.00	0.00	0.00	0.00	159.00	Hours Worked	0.24000	$38.16
Default Work Classification	DISABILITY	DIS	159.00	2.00	0.00	0.00	0.00	0.00	0.00	2.00	Flat Rate	0.00000	$0.00
Default Work Classification	VAC	VAC	159.00	2.00	0.00	0.00	0.00	0.00	0.00	2.00	Flat Rate	1.56000	$3.12
Default Work Classification	Hourly Education Fund	EDH	159.00	2.00	0.00	0.00	0.00	0.00	0.00	159.00	Hours Worked	0.02000	$3.18
Default Work Classification	DEP COPAY	DCP	159.00	2.00	0.00	0.00	0.00	0.00	0.00	2.00	Flat Rate	0.00000	$0.00
TOTAL													**$5,948.48**

Employee Details:

Name	Work Class	HW	FR	S1	S2	S3	S4	S5	H&W	DB	IBC	LGL	EDM	DEP	DIS	VAC	EDH	DCP
DOE, JANE	Default Work Classification	67.00	1.00	0.00	0.00	0.00	0.00	0.00	$2,284.79	$653.60	$1.01	$10.05	$0.50	$16.08	$0.00	$1.56	$1.34	$0.00
DOE, JOHN	Default Work Classification	92.00	1.00	0.00	0.00	0.00	0.00	0.00	$2,284.79	$653.60	$1.38	$13.80	$0.50	$22.08	$0.00	$1.56	$1.84	$0.00
TOTAL		**159.00**	**2.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**$4,569.58**	**$1,307.20**	**$2.39**	**$23.85**	**$1.00**	**$38.16**	**$0.00**	**$3.12**	**$3.18**	**$0.00**

- **Clicking <u>Finalize Contribution</u> will take you to the above screen, which gives the below options.**
  - **<u>Pay Now</u> – Takes you to the next step so you can remit payment via ACH or Check**
  - **<u>Print Invoice</u> – Use this option to print a copy of the invoice for your records**
  - **<u>Done</u> - Use this option to enter another contribution form before making your payment**

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Enter a New Form - Pay Invoice(s)

Home	Electronic Contribution	Contribution Payment	Employer Information	News	Contact Us

Pending Payment

Select Contractor:	██████████████ INC ▼		Invoice Number:	
* Invoice Begin Date:	8/30/2020 ▼		* Invoice End Date:	9/30/2020 ▼

Search   Clear

In accordance with the Collection Procedures, contribution payments are due on the 20th day of the month immediately following the work month and are considered delinquent if not received by the same day. Pursuant to the Collection Procedures adopted by the Trustees, payments received past the due date are subject to liquidated damages of 10% of the unpaid contributions and interest on the unpaid contributions of 12% per annum. The first 'late' of the calendar year is forgiven as long as no other late reports are received.
If you have ACH Block or Filtering on the bank account listed below, the Company ID for this transaction will be 2065308.

Pending Invoice:

Select Invoice   Cancel

☐	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
☑	CW20-00000009	08/31/2020	00	BTE AGREEMENTS	████	$6,513.60	DemoContractor	09/30/2020

Select Invoice   Cancel

- **After selecting Pay Now, you will be taken to the Pending Payment page which will show all contribution forms entered on the website that have not yet been paid. Here, you will select the open invoice(s) you would like to remit payment for (via ACH or Check).**
- **Once you check the box(es) to the left of the invoice(s) desired, click the Select Invoice button.**

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Enter a New Form - Pay Invoice(s)

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Pending Payment

Payment Summary
(1) Invoice Selected
Total amount due: $6,513.60

[Make Payment] [Edit Selection]

Select Contractor: [_____] INC [▼]   Invoice Number: [_____]

* Invoice Begin Date: [8/30/2020 ▼]   * Invoice End Date: [9/30/2020 ▼]

[Search] [Clear]

In accordance with the Collection Procedures, contribution payments are due on the 20th day of the month immediately following the work month and are considered delinquent if not received by the same day. Pursuant to the Collection Procedures adopted by the Trustees, payments received past the due date are subject to liquidated damages of 10% of the unpaid contributions and interest on the unpaid contributions of 12% per annum. The first 'late' of the calendar year is forgiven as long as no other late reports are received.
If you have ACH Block or Filtering on the bank account listed below, the Company ID for this transaction will be 2065308.

Pending Invoice:

[Select Invoice] [Cancel]

☐	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
☑	CW20-00000009	08/31/2020	00	BTE AGREEMENTS	■	$6,513.60	DemoContractor	09/30/2020

[Select Invoice] [Cancel]

- **After clicking <u>Select Invoice</u>, the invoice(s) you've selected will show highlighted in orange and a "Payment Summary" will be displayed in the upper-left corner showing the total amount due for the selected invoice(s).**

- **If the amount is correct, click <u>Make Payment</u>.**
  - **Use the <u>Edit Selection</u> option if you selected the wrong invoice(s). This will allow you to change your selections.**

Enter a New Form - Pay Invoice(s)

Invoice#	Wrk Date	Section	Cont No.	Amount
CW20-00000009	08/31/2020	BTE AGREEMENTS	▬▬	$6,513.60
TOTAL				**$6,513.60**

Make Payment

Home	Electronic Contribution	Contribution Payment	Employer Information	News	Contact Us

Total Invoice Amount : $6,513.60

Invoice Adjustment Amount: $0.00

Total Amount Due: $6,513.60

Adjustment Reason:

Pay By: ● ACH(Online) ○ Check

Submit   Cancel   Back

- **Clicking <u>Make Payment</u> takes you to the above screen showing the invoice(s) you've selected and the total amount due.**
- **Option to adjust amount being paid**
  - **Use the <u>Invoice Adjustment Amount</u> field to enter an adjustment amount (if any). You may enter a positive or negative amount to increase or decrease the payment amount by the amount you've entered. This will automatically update your <u>Total Amount Due</u>.**
  - **When an adjustment amount is entered, you are required to also enter the reason for the adjustment in the <u>Adjustment Reason</u> box (e.g. Liquidated Damages or Over/Under payment from a prior period).**

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Enter a New Form - Pay Invoice(s)

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Make Payment

Invoice#	Wrk Date	Section	Cont No.	Amount
CW20-00000009	08/31/2020	BTE AGREEMENTS	▆▆▆	$6,513.60
TOTAL				**$6,513.60**

Total Invoice Amount : $6,513.60

Invoice Adjustment Amount: [$0.00]

Total Amount Due: $6,513.60

Adjustment Reason:

Pay By: ⦿ ACH(Online)   ◯ Check

[Submit] [Cancel] [Back]

- **Now select your Pay By type**
  - **If you select ACH (Online) and click submit you will be taken to the ACH Payment screen (see next page).**
    - **First time ACH payments will be prompted to complete the below form specifying your company name, bank account number, routing number, and account type.**
  - **This information will be saved for future contributions and only needs to be updated if it has changed.**

Select Contractor: ▆▆▆▆▆▆ INC ⌄

* Routing Number: [ ]

* Bank Account Number: [ ]

* Account Type: ⦿ Checking   ◯ Saving

Bank Name:

W2KFJG

[Get New Image]

* Please enter the characters as shown in the image.

[ ]

[Submit] [Cancel]

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Enter a New Form - Pay Invoice(s)

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ACH Payment

In accordance with the Collection Procedures, contribution payments are due on the 20th day of the month immediately following the work month and are considered delinquent if not received by the same day. Pursuant to the Collection Procedures adopted by the Trustees, payments received past the due date are subject to liquidated damages of 10% of the unpaid contributions and interest on the unpaid contributions of 12% per annum. The first 'late' of the calendar year is forgiven as long as no other late reports are received.
If you have ACH Block or Filtering on the bank account listed below, the Company ID for this transaction will be 2065308.

Total Amount Due:	**$6,513.60**
Bank Account Number: (Last 4 digits)	
Routing Number: (Last 4 digits)	
Bank Name:	
Account Type:	Checking
Settlement Date:	10/2/2020

Edit Account   Submit   Cancel

*Note:Click Edit Account to correct your bank account.

- o **Once on the ACH Payment screen:**
  - ▪ **Input a settlement date for when you would like the funds withdrawn from your account. _Note_: because there is a 2 work day lag between when ACH transactions are submitted and when they are deposited into the fringe fund's bank account, you must submit your payment at least 2 work days prior to when you want it to be considered paid.**
  - ▪ **If you have an ACH block on your bank account, please make sure that you provide your bank the appropriate details in order for the payment to be processed.**
  - ▪ **After selecting Submit, you will be taken to a Payment Confirmation page. This can be printed for your records. This information will also be saved under the Contribution Payments tab of the website.**

**If you select to pay by check**, after you click Submit on the Make a Payment screen, you will be taken to a Payment Confirmation page. You will need to print and mail this Payment Confirmation with your check.

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Modify A Saved Contribution Form

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Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: ▮▮▮▮▮▮ INC ⌄

Process Contribution:

| Enter New Contribution |
| Modify / Submit Saved Contribution |
| Upload Contribution File |
| Copy / Modify Previous Report Form | | Work EndDate |

*Batch Number: ⌄

Submit   Cancel

- **If you select <u>Modify / Submit Saved Contribution</u> from the Electronic Contribution page, you can open a previously saved contribution form and continue from where you left off. Saved but unsubmitted contribution forms are only saved for 30 days. Once you submit a contribution form, however, it is saved permanently.**

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Modify A Saved Contribution Form

1. Select a saved batch by selecting its batch number from the Batch Number drop down list.
2. Click the <u>Submit</u> button.
3. The rest of the process is the same as entering a new contribution form (refer to instructions above).

Upload a Contribution File

- **If you select <u>Upload Contribution File</u> from the Electronic Contribution page, you can upload contribution form data directly into the system from a data file in .CSV or .TXT format. These files can normally be extracted from your company's payroll system. Using this option can be helpful when there are a large number of employees for whom fringe contributions are being reported.**
    1. **Select a <u>Work Start Date</u> and <u>Work End Date</u>. If you are a monthly contractor, please use the first day and the last day of the month. If you are a weekly contractor, please use the payroll start and end dates.**
    2. **Select the appropriate CBA based on the work you are reporting for. This will pull the related fringe rates.**
    3. **Click the <u>Choose File</u> button to find the .CSV or .TXT file you want to use.**

Upload a Contribution File

Whether you export from your payroll system or you use Excel to create spreadsheets with employee information, you need to save your file as a .CSV or .TXT file. Simply select "File," "Save As," and choose .CSV or .TXT from the "Save as type" drop down list.

Below is the file format that must be used in order to upload contributions. The columns must be in this exact order or an error will occur and you will be unable to upload. A header line should _not_ be used in your file (i.e. employee contribution information should begin in row 1. If a header line is included, it will cause errors when uploading.)

All fields must be field out with the only exception of MI (Middle Initial) field. If you are an employer that does not report shifts, all the shift fields still need to be 0 on the import file.

	SSN	WORK CLASS	FIRST NAME	LAST NAME	MI	HOURS WORKED	FLAT RATE	SHIFTS WEEK 1	WEEK 2	WEEK3	WEEK 4	WEEK 5
	A	B	C	D	E	F	G	H	I	J	K	L
1	234567890	DFLT	JANE	DOE		67	1	0	0	0	0	0
2	123456789	DFLT	JOHN	DOE		92	1	0	0	0	0	0
3	345678912	DFLT	JIM	DOE		27	0	4	2	0	1	0
4												

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Work Class Codes

When uploading a contributions file, please be sure to only select work classes that are associated with the Collective Bargaining Agreement you are submitting contributions under. If a work class is used that is not associated with your CBA, you may receive unexpected results. All of the fund's work classes are shown below.

DFLT

DFLT1

DFLT2

DFLT3

DFLT4

DFLT5

NOPEN

PENO

Upload a Contribution File

- **Upon clicking <u>Submit</u>, you should be taken to a screen that looks similar to the above. If, however, your data or file format is incorrect, you will receive an error message and the file will not be uploaded.**
- **Once the file has been successfully uploaded, you can proceed as if you were entering a new contribution form (refer to instructions above).**

Copy/Modify Previous Report Form

- **If you select <u>Copy / Modify Previous Report Form</u> from the Electronic Contribution page, you will be able to reuse electronic contribution data previously input into the system for the current month you are now entering. This option will auto-populate the same Employees (with SSN & names) as were previously used by you for the selected CBA. This can be beneficial when you consistently report on the same employees each pay period.**
    1. **Select a <u>Work Start Date</u> and <u>Work End Date</u>. If you are a monthly contractor, please use the first day and the last day of the month. If you are a weekly contractor, please use the payroll start and end dates.**
    2. **From the <u>Invoice Number</u> drop down list, select the Invoice you would like to copy.**
    3. **Check the box in the bottom left of the screen to zero out any information from the copied data. This will keep the same employees but zero out their form details so you can enter the correct amounts for this pay period.**
    4. **Click the <u>Submit</u> button.**
    5. **The rest of the process is the same as entering a new contribution form (refer to instructions above).**

How to View Past Contribution Forms

- **You can view all your previously submitted contributions by selecting the <u>View All Contributions</u> link as shown above.**

How to View Past Contribution Forms

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View All Contributions

Select Contractor: Select Contractor ⌄   **Begin Date:** 8/30/2020 ⌄   **End Date:** 9/30/2020 ⌄

Search

Special Note: A nightly process is set up to process ACH payments on the same day of entry. If you wish to delete a form that is associated to an ACH payment you must do this the same day of entry before the nightly process takes place. If you have multiple forms associated with one payment please be advised that deletion of one form will automatically place a stop on your ACH payment.

- **Once on the View All Contributions screen, you can select a contractor name from the drop down list (some contractors can have multiple contractor numbers to choose from based upon how their account is setup).**
- **Once you click the Search button it will show a screen with all past contribution forms for the contractor you've selected (see below).**

How to View Past Contribution Forms

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View All Contributions

Select Contractor: [redacted] INC   Begin Date: 8/30/2020   End Date: 9/30/2020

Search

Special Note: A nightly process is set up to process ACH payments on the same day of entry. If you wish to delete a form that is associated to an ACH payment you must do this the same day of entry before the nightly process takes place. If you have multiple forms associated with one payment please be advised that deletion of one form will automatically place a stop on your ACH payment.

Invoice #	Wrk Date	Section Code	Section	No.Empl	Cont No.	Contractor	Amount	Status	Payment	Deposit Dt	Submitter	Trans. Dt	Del
CW20-00000011	08/31/2020	00	BTE AGREEMENTS	2		INC	$6,513.60	Pending			DemoContractor	09/30/2020	☐
CW20-00000010	08/31/2020	00	BTE AGREEMENTS	2		INC	$6,513.60	Pending			DemoContractor	09/30/2020	☐
CW20-00000009	08/31/2020	00	BTE AGREEMENTS	2		INC	$6,513.60	Pending	ACH	10/02/2020	DemoContractor	09/30/2020	☐

Delete Contribution(s)

- **If you wish to delete any of the invoices shown, you may do so from this screen, however, _you can only_ delete invoices with a "Pending" status. To delete these invoices, check the box in the <u>Del</u> column next to the invoices to be deleted, then click the <u>Delete Contribution</u> button at the bottom of the page.**
- **To delete invoices with an "In Process" status, you will need to contact the fund office.**
- **Invoices with a "Paid" status cannot be deleted, as these have already been processed and entered into the contributions system.**

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How to Make Payments on Multiple Saved Forms

- **If you have entered and saved multiple invoices and have not yet processed a payment for them, you can process one payment for multiple invoices, whether by ACH or Check.**
- **From the Contribution Payment dropdown menu choose Make a Payment (see above).**

How to Make Payments on Multiple Saved Forms

- **Once on the Make a Payment screen, all contribution forms that have not been finalized for payment will be listed.**
- **If you would like to filter the unpaid invoices, you can enter an <u>Invoice Begin</u> and <u>Invoice End</u> date to narrow or widen your search results.**
- **To pay invoice(s), check the box to the left of the Invoice Numbers you would like to pay, then click the <u>Select Invoice</u> button. This will combine all forms you selected into one payment amount and you can continue to make your payment through the normal payment process (refer to instructions above).**

Questions

For questions, enrollment, or training, please call 844-492-9157 or 415-268-4252 and ask to speak with someone from our Contributions Team.

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