Assign Accounting Centre SSI to Groups

See previous W5 version guide

PURPOSE

This document explains the procedures on how to assign a accounting Centre SSI or bank account to multiple SSI groups.

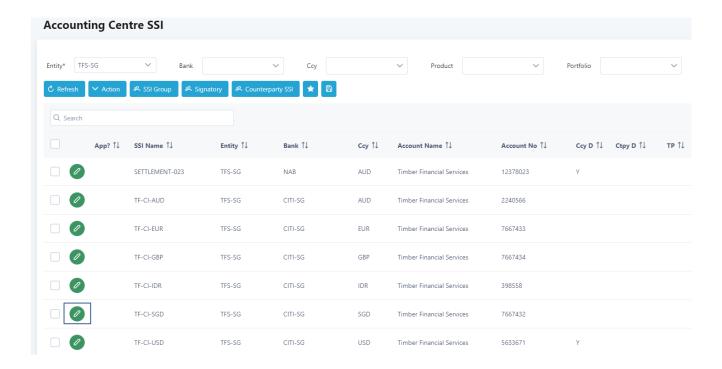
WHY IS THIS IMPORTANT?

This allows user to assign one accounting centre SSI to multiple groups in a more convenient and faster way.

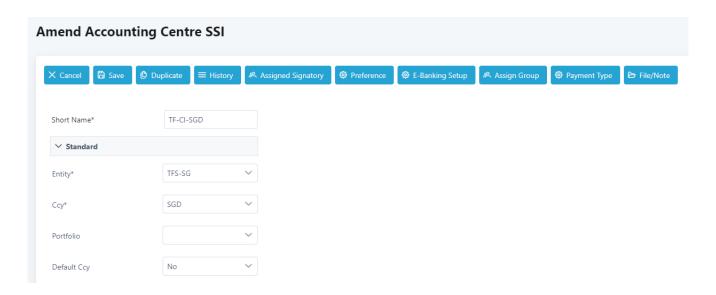
PROCEDURE



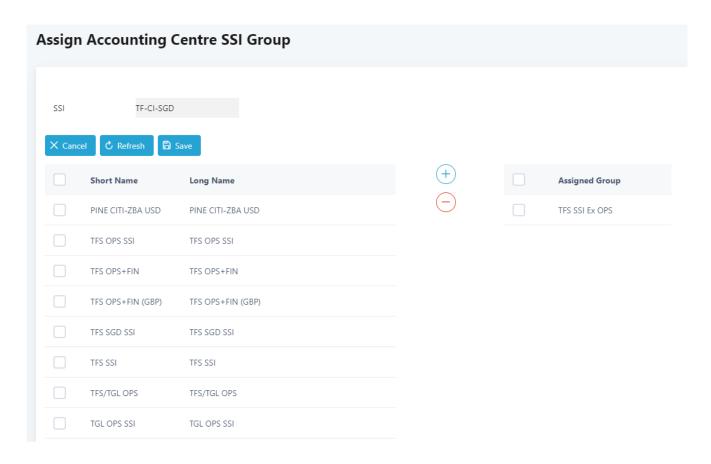
1. From Accounting Centre SSI screen (Set Up > Static > Settlement Instructions), click on the Edit button of the SSI (e.g. TF-CI-SGD) to drill down to Amend Acct Cntr SSI screen.



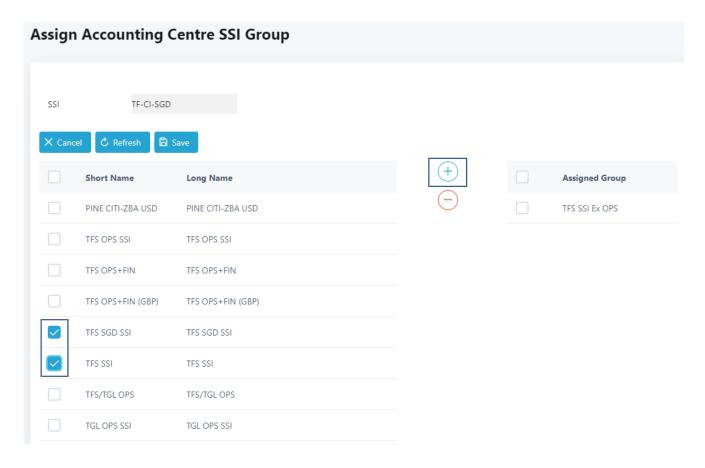
2. Click on Assign Group.



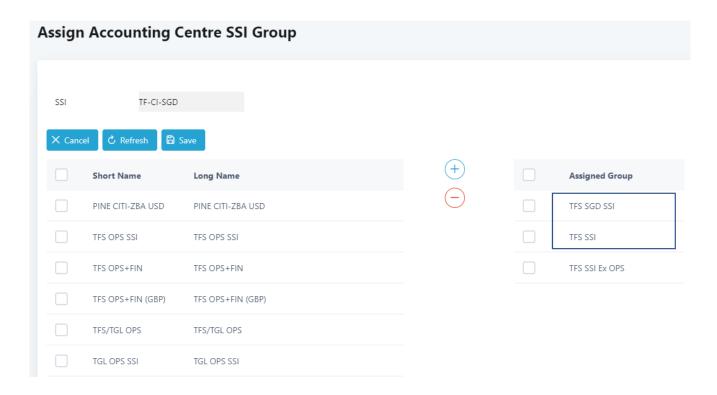
3. The following screen displays.



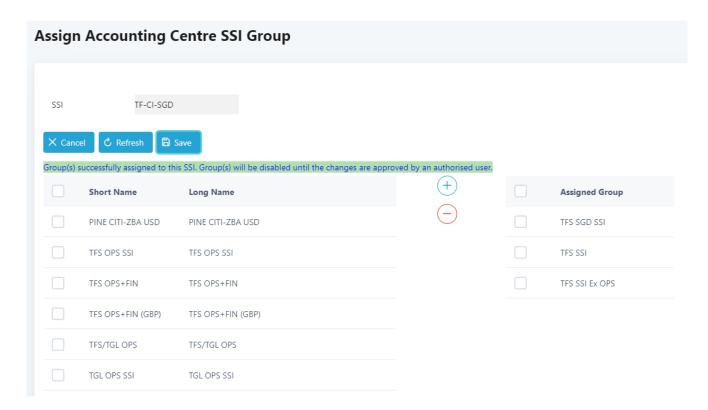
4. To assign SSI to group(s), tick on the check box of the SSI group short name from the list on your left and click Add.



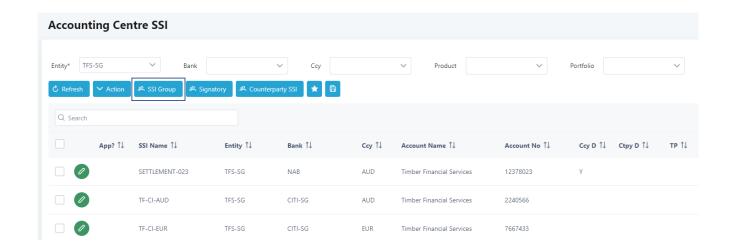
5. Selected groups will be added to the Assigned Group list on your right.



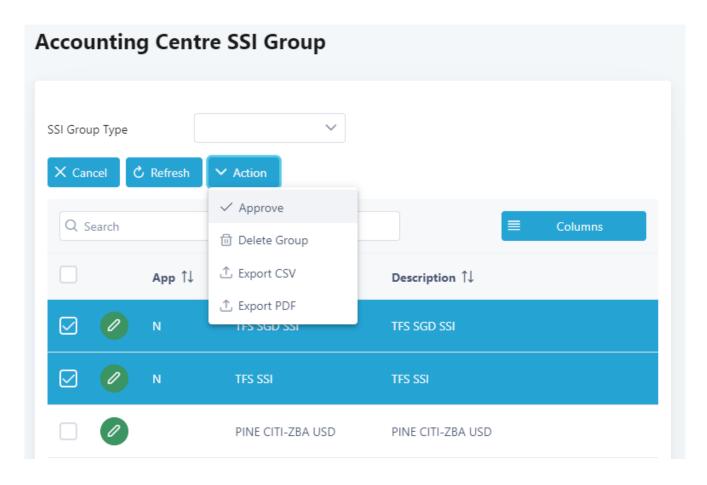
- 6. Click Save to save changes.
- 7. The following message will displays.



8. To approve the SSI groups, navigate to Set Up > Static > Settlement Instructions. Click SSI Group.



9. Tick on the checkbox of the SSI groups and click Action and Approve.



10. Accounting Centre SSI groups will be approved. Changes are audit logged in SSI group Change History (Set Up > Static > Settlement Instructions > SSI Group > Click the Edit button of the Group to drill down to the Amend Accounting Centre SSI Group > Click on History).

Accounting Centre - SSI Group Change History TFS SGD SSI C- Back Timestamp Userid Type/Status Description 16 Feb 2023 12.05.58 admin@devent1.com Changes Approved Approval Status 16 Feb 2023 12.05.45 admin@devent1.com Changes Acct Cntr SSI Group Member Added: TF-CI-SGD

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

Accounting Centre SSI Set Up

Accounting Centre SSI Group

CHANGE HISTORY

Date	Ву	Changes
22-May-2018	TS	Created.
23-May-2018	Anuja	Recreated. Reformatted.
20-Aug-2018	Silpa	Updated step 1, 8, 10.
12-Nov-2019	Lуга	Updated screenshot.
16-Feb-2023	TS	Updated to W6 instructions and screenshots.