Owner Functionality

Title: Batch Post Transactions

Path: *Owner Management* → *Owner Posting Tools* → *Batch Post Transactions*

Purpose: This utility is designed to post a single transaction (all elements in common) to a group of Contract folios all at once. There are two methods for identifying the target Contracts:

- **Locate Condition**: For those who are comfortable constructing logic statements, this tool allows the User to build (and save) filter conditions from 20 specific databases and the fields therein. The somewhat arbitrary selection of tables limits the effectiveness of this approach but, depending upon the exact nature of the needed filter, it may be the best option (e.g. post a transaction to all Owner Contracts created prior to a certain date.)
- **Charge Code**: These are single alpha/numeric character codes placed on a Contract's Fees and Disbursements tab for the purpose of grouping Contracts in a meaningful way. Up to three codes may be placed on each Contract. Charge codes are not defined within ^{SMS}|Host but are simply used by agreement.

 A tally of transactions and their total value is displayed following posting.

Best Practice: Using the Charge Code method, this can be a very quick way to post a single charge. These codes are also employed by the Auto-Post Owner Charges utility which can be used in a very similar manner, though it does offer a couple of additional, if obscure, filters and posting options.