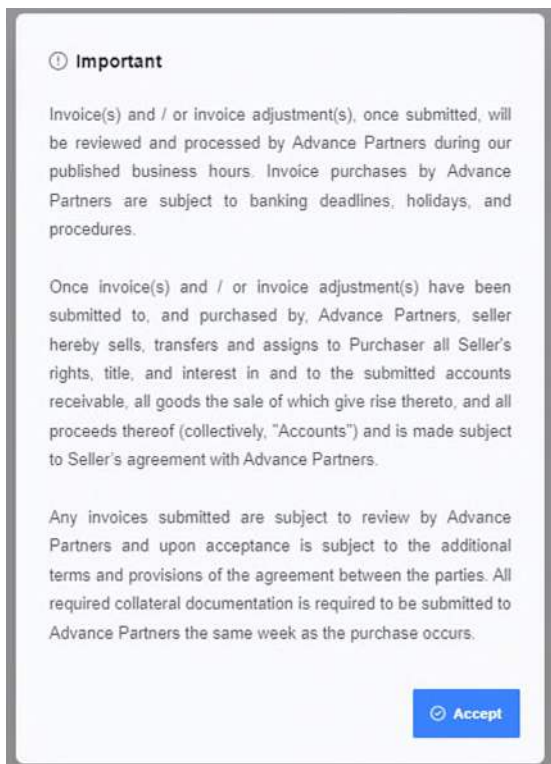


How to Import Adjustments into the Client Portal

Client Data Import



You will receive an important message about submitting invoices/adjustments.



Please click Accept to accept the terms.

Step 1

Quick Step

Import CSV Data

Step 1: Select Import Type and Download Template

Select Import Type ▼

Select the Import Type

Options are Invoices and Adjustments

Import CSV Data

Step 1: Select Import Type and Download Template

Select Import Type ▼

- Select Import Type
- Invoices
- Adjustments

When you click Adjustments you will see Download Template. Click this to get a blank template for importing your adjustments.

Import CSV Data

Step 1: Select Import Type and Download Template

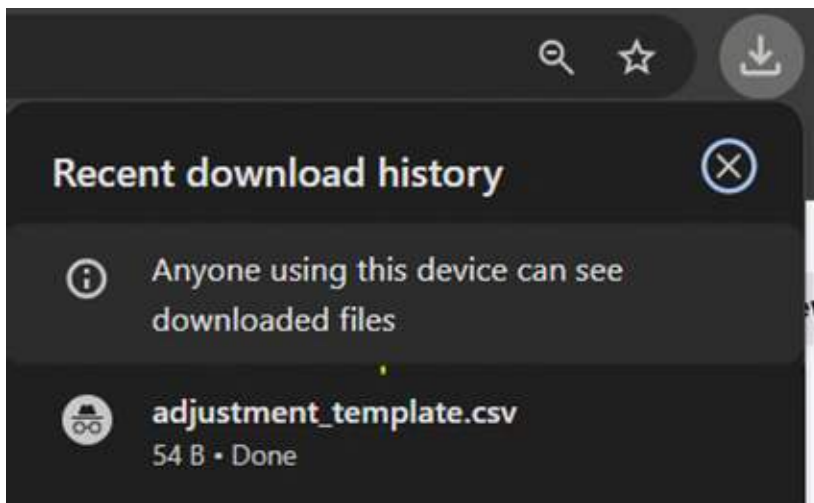
Adjustments ▼

- Select Import Type
- Invoices
- Adjustments

[Download Template](#)

Pick where you want to save the template and enter the file name.

You can click Recent Download in the upper right corner of your browser to find the Template.



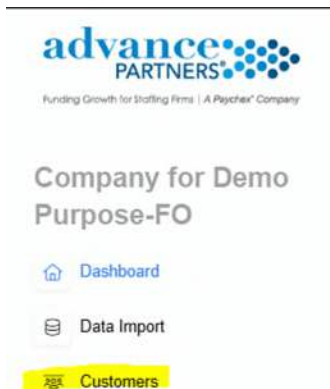
You can also navigate to where you saved the template on your PC or network.

Open the Template

Now you can add your adjustment information

	A	B	C	D	E
1	location_id	adjusted_invoice_id	new_amount	explanation	
2					
3					

Location ID – This can be found under the Customer Name in the portal



Quick Step

Customer - ABM Industries Incorporated
Approval, Billing Reviewed

Name: Email: Account Credit Limit: Send Billing To:

☐ Do Not Bill
☐ Auto Chargeback
☐ Please Billing
☐ NGA Approved
☐ CC Corporation

Locations

Name	Location ID	Terms
1111CFDP	1111CFDP	

Adjusted Invoice ID – the invoice number you are adjusting

New Amount – the correct invoice amount

Explanation – any description you would like to add for the adjustment

Review Import Data [NEW](#) [View Import Batches](#) Last Updated: 3/18/2025, 5:23:56 PM [Open Support Case](#) [Reset Import](#) [Submit](#)

Count: 1 New Amount: \$22,601.51

ACTIONS	LOCATION_ID	ADJUSTED_INVOICE_ID	NEW_AMOUNT	EXPLANATION
+ -	97ABCorp	31702	22601.51	Missed employee h

At this point you can make changes.

On the Review Import Data you can edit

+ will allow you to manually add a line

- will allow you to delete a line

This message will appear if you try to delete a line

Are you sure you want to remove this row?

[OK](#) [Cancel](#)

Click OK to remove

Tip if you click in a field like Location ID you will see a drop down to pick the Location

After any edits you can click Submit

Review Import Data [NEW](#) [View Import Batches](#) Last Updated: 3/18/2025, 5:23:56 PM [Open Support Case](#) [Reset Import](#) [Submit](#)

Count: 1 New Amount: \$22,601.51

ACTIONS	LOCATION_ID	ADJUSTED_INVOICE_ID	NEW_AMOUNT	EXPLANATION
+ -	97ABCorp	31702	22601.51	Missed employee h

While processing you will see this message – Queued in blue

Quick Step

Review Import Data

QUEUED

View Import Batches

Open Support Case

Download Batch Data

Count: 1

New Amount: \$22,601.51

RESULT	LOCATION_ID	ADJUSTED_INVOICE_ID	NEW_AMOUNT	EXPLANATION
-	797ABCorp	31702	22,601.51	Missed employee hours

When done you will see – Complete in green

Review Import Data

COMPLETE

View Import Batches

Download Batch Data