

HOW TO ENTER RECEIPTS IN MyPTEZ

Example: Sunshine Elementary PTA had a Family Movie night. \$250 worth of tickets were sold. Everyone paid in cash.

FINANCIAL SECRETARY enters the receipt in MyPTEZ and assigns money to correct category.

1. Go to **Receipts/Write New Receipt**
2. Enter date
3. In the “From” box – you can enter “Multiple Receipts”
4. **ALWAYS ENTER A DESCRIPTIVE MEMO!** In this case it could be “Family Movie night ticket sales”
5. Under Category type choose “Movie Night Income”* – enter \$250.00; click “Add”
6. Select Cash; verify that \$250 shows in the box
7. Click “Save”

Write New Receipt

The screenshot shows the 'Write New Receipt' form with the following fields and annotations:

- Date:** 04/02/2021
- Printed?:**
- Number*:** 121420h
- From:** Multiple Receipts
- Memo:** Family movie night ticket sales (Annotated with 'DESCRIPTIVE MEMO')
- Categories:** Movie Night-Income (Annotated with 'ENTER CATEGORY AND AMOUNT INFO HERE AND IT WILL MOVE BELOW WHEN YOU CLICK "ADD"')
- Name:** Multiple Receipts
- Amount*:** \$ 250.00
- Add:** Green button to add the category and amount.
- Memo Table:**

Memo	Qty	Price	Tax	Total
Movie Night-Income For: Multiple Receipts				\$250.00
- Total:** \$250.00
- Payment Type:** Cash, Check, Card (Annotated with 'SELECT CASH AND THE AMOUNT WILL MOVE BELOW AS "CASH" WHEN YOU CLICK').
- Card Note:** Card payments are for your record keeping only when entered here
- Receipt Table:**

Type	Name	Number	Amount
CASH			\$250.00
- Total:** \$250.00
- Buttons:** Find Receipt, Previous, Next, New Receipt, Save (Annotated with 'CLICK SAVE')

Please note that **your category names might be slightly different than the category names in the example here. **Treasurers should go over the Category List with Financial Secretaries to make sure they are using the same categories for the same things.***