

# About Batches

## Summary:

Explanation of batches

What is the hierarchy of batches?

When multiple batches are on file for the same transaction type, which batch is used?

## Cause:

Batches allow multiple users to enter, edit and post the same types of transactions simultaneously, while preventing multiple users from modifying or posting an individual transaction at the same time.

## Solution:

When only one batch ID for a particular transaction type is on file all users process transactions of that type using that batch ID.

When multiple batches for a transaction type are on file, the appropriate batch for each user is determined as follows:

- User batch ID
- Workgroup batch ID
- DEFAULT batch ID
- User-defined (but not user specific) batch ID

When entering a transaction and no user, workgroup or DEFAULT batch ID is on file for the for the specific transaction type the user is prompted to select a user-defined batch ID from the **Batch Selection** window.

With no user-defined batch ID on file the transaction cannot be entered until a batch has been added, which can be done from the Batch Selection window by clicking the **Add** button or hitting **F2**.

**NOTE:**

Use the **Set up batches** button on the Users form to create batches for specific user IDs.

Use the **Set up batches** button on the Company form to create DEFAULT batches for the whole company

Use the **Set up batches** button on the Workgroup form to create DEFAULT batches for the workgroup.

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