



## Using Cash Receipt Ticket (CRT) Templates

This document describes how to create a CRT template that can be reused, how to find the template after created, and how to use the template for increased efficiency and accuracy.

### Contents

Upon completion of this guide, you will be able to:

- Access the Cash Receipt Ticket (CRT)
- Find existing CRTs
- Save a CRT as a template
- Name and describe the template
- Create a new CRT from the template

### Related Resources

Refer to your revenue budget – or to the Office of Budget and Planning website – for the revenue account codes that apply.

Refer to the Financial Operations, Depository Services, website for deposit processes, policy, and contacts.

Obtain all deposit equipment and materials – such as deposit tickets and deposit bags – from Depository Services.

### Before you begin the CRT...

Obtain the chart string(s) to which the revenue will be posted:

- Fund and Department ID (identifying the school, unit, or department)
- Account (identifying the source of the revenue)
- Other categories, if applicable, such as Project and Activity IDs, Program, or ChartField1.

### How do I access the Cash Receipt Ticket (CRT)?

1. From the [NUPortal](#), click Financials. Locate the link Dept Deposits / CRT under the heading Financial Related Links at the bottom of the page.
2. From the [Financial Applications Gateway](#), login to NUFinancials. From the Main Menu, click NU Interfaces and Processes > NU Cash Receipt Ticketing.

### Who has access?

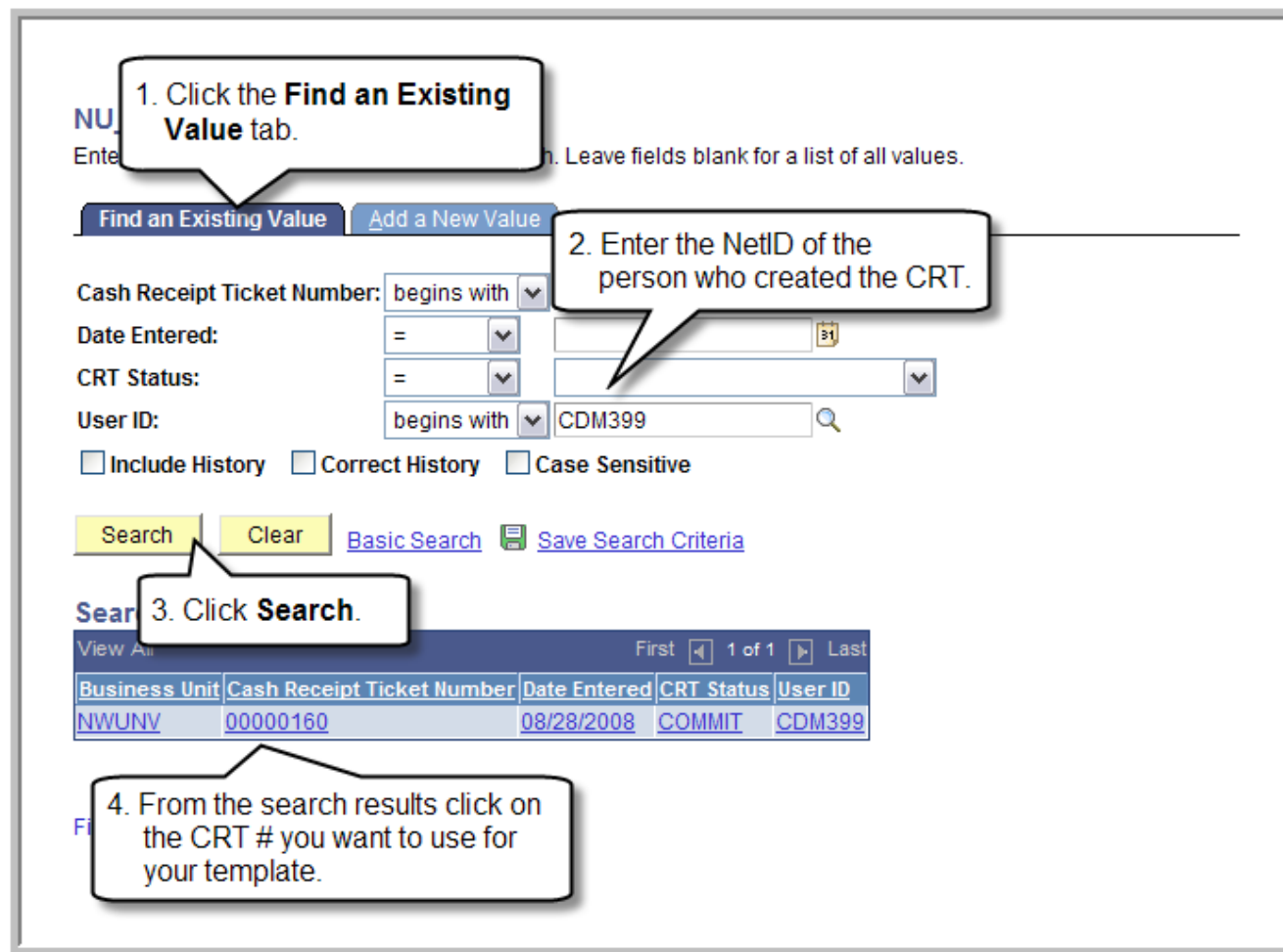
Departments and units that receive revenue and are established as a Cash Handling Unit with Financial Operations, Depository Services.

### Where do I get help?

For assistance, contact NUIT Support Center at 847-491-HELP (4357) or e-mail [consultant@northwestern.edu](mailto:consultant@northwestern.edu).

## Step 1: Find the CRT from which you want to create a template

This example shows you how to find a CRT – that you previously created – and save it as a template. You may also create a CRT and then save it as a template.



1. Click the **Find an Existing Value** tab.

2. Enter the NetID of the person who created the CRT.

3. Click **Search**.

4. From the search results click on the CRT # you want to use for your template.

Search Results:

Business Unit	Cash Receipt Ticket Number	Date Entered	CRT Status	User ID
NWUNY	00000160	08/28/2008	COMMIT	CDM399

## Step 2: Save the CRT as a template

You may click *Save as Template* on any CRT.

Nu Crt Entry

Cash Receipt Ticket Number: 00000160

Entered By: CDM399

Status: COMMITTED

[View Receipt](#)

Date Entered: 08/28/2008

Date Committed: 08/28/2008

Posting Status: Not Posted

1. Click **Save as Template**.

[Save as Template](#)   [Commit](#)   [Void](#)

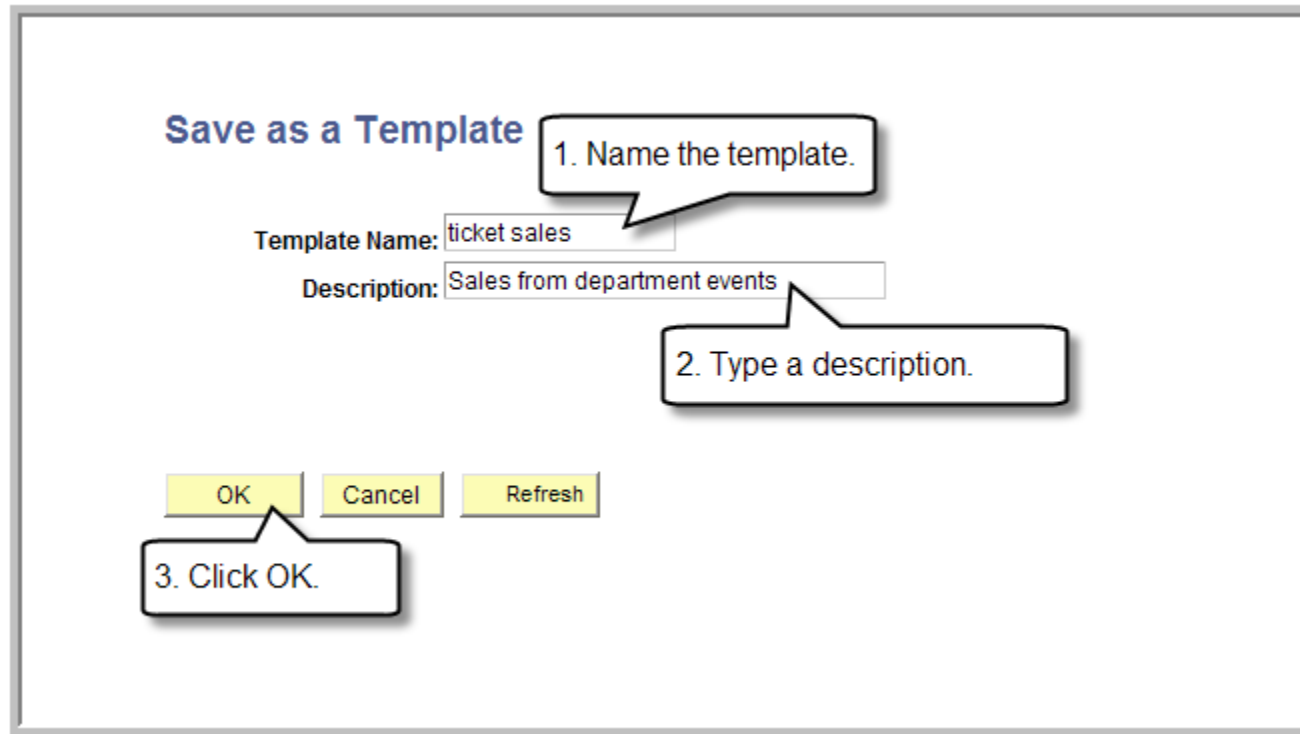
**Distribution Total:** 413.00

Line	*Fund Code	Department	Project	Activity	Program Code	*Account	Amount	Description
1	110	4651000				40604	313.00	ticket sales
2	110	4651000				40606	100.00	course materials

**Media Total:** 413.00

Line	*CRT MEDIA TYPE	*Deposit/Ref ID	Amount	Match Line Status
1	Cash	1000100027	63.00	
2	Check	1000100027	100.00	
3	Visa/Mastercard	0011234	200.00	
4	Wildcard	0011234	50.00	

### Step 3: Name and describe the template



**Save as a Template**

1. Name the template.

Template Name:

Description:

2. Type a description.

OK Cancel Refresh

3. Click OK.

## Step 4: Navigate to the CRT creation page

The CRT used to create your template appears. The *Save as Template* button is grey which indicates that the template was created.

Nu Cr Entry

Cash Receipt Ticket Number: 00000160 View Receipt

Entered By: CDM399 Date Entered: 08/28/2008

Committed By: CDM399 Date Committed: 08/28/2008

CRT Status: COMMITTED Posting Status: Posted

Save as Template
Commit
Void

Distribution Total: 413.00

Line	*Fund Code	Department	Project	Activity	Program Code	*Account	Amount	Description
1	110	4651000				40604	313.00	ticket sales
2	110	4651000				40606	100.00	course materials

Media Total: 413.00

Line	*CRT MEDIA TYPE	*Deposit/Ref ID	Amount	Match Line Status
1	Cash	1000100027	63.00	Y
2	Check	1000100027	100.00	Y
3	Visa/Mastercard	0011234	200.00	N
4	Wildcard	0011234		

1. Click the **Add** button to start a new CRT.

Save
Return to Search
Notify
Refresh
Add
Update/Display
Include History
Correct History


## Step 5: Create a new CRT from your template

The screenshot shows the 'NU\_CREATE\_CRT' web interface. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected. Below the tabs, there are three input fields: 'Business Unit' with the value 'NWUNV', 'Cash Receipt Ticket Number' with the value 'NEXT', and 'CRT TYPE' with a dropdown menu. The dropdown menu is open, showing three options: 'Blank CRT', 'Blank CRT', and 'Create From Template'. The 'Create From Template' option is highlighted. To the left of the dropdown menu is a yellow 'Add' button. Below the 'Add' button is a blue link that says 'Find an Existing Value' and 'Add a New Value'. Three callout boxes provide instructions: 1. 'Click the Add a New Value tab.' points to the 'Add a New Value' tab. 2. 'Select Create From Template.' points to the 'Create From Template' option in the dropdown menu. 3. 'Click Add.' points to the yellow 'Add' button.

## Step 6: Select your template

1. Either type the name of the template or click the search icon to find it.

**Lookup Existing CRT Template**

\*Template Name:  

4. Click **OK**, after a template name is entered in the *Template Name* box.

**Look Up Template Name:**

Template ID:

New Description:

Entered by:

[Basic Lookup](#)

**Search Results**

View All First 1-3 of 3 Last

Template ID	New Description	Entered by	Name
<a href="#">FOOTBALL TICKET</a>	<a href="#">revenue for varsity</a>	<a href="#">CDM399</a>	<a href="#">Cristie Mullins</a>
<a href="#">TICKET SALES</a>	<a href="#">Sales from department events</a>	<a href="#">CDM399</a>	<a href="#">Cristie Mullins</a>

3. Click the template name.

2. Enter your search criteria, and then click **Look Up**.

## Step 7: Complete the new CRT

The template keeps the chart strings, descriptions, and media types you select. You must fill in the amounts and Deposit/Ref IDs. Complete the template as you would normally complete the CRT.

[New Window](#) | [Custor](#)

**Nu Crt Entry**

Cash Receipt Ticket Number: NEXT

Entered By: CDM399 Date Entered: 09/10/2008

Committed By: Date Committed:

CRT Status: Posting Status: Not Posted

**Distribution Total:**

Account Distribution									
Line	*Fund Code	Department	Project	Activity	Program Code	*Account	Amount	Description	
1	11C	4651000				40604		ticket sales	+ -
2	11C	4651000				40606		course materials	+ -

**Media Total:**

Media Detail					
Line	*CRT MEDIA TYPE	*Deposit/Ref ID	Amount	Match Line	Status
1	Cash				+ -
2	Check				+ -
3	Visa/Mastercard				+ -
4	Wildcard				+ -

### What happens next?

Complete the CRT and commit it for processing.





## Summary

Access the CRT in one of two ways:

- From the NUPortal, click Financials and locate the link Dept Deposits / CRT
- From the NUFinancials Main Menu, click NU Interfaces and Processes > NU Cash Receipt Ticketing

Step 1: Find the CRT you want to create a template from

Step 2: Save the CRT as a template

Step 3: Name and describe the template

Step 4: Navigate back to the CRT creation page

Step 5: Create a new CRT from your template

Step 6: Select your template

Step 7: Complete the new CRT

## What happens next?

Commit the CRT for processing.