Reconciliation Guide

Building the CSV Spreadsheet Guide:

Example CSV structure:

Date	Username	rate_a	rate_b	rate_c	rate_d	rate_e
12/1/2023	One worker	5	6	5	5	5
12/1/2023	Two worker	5	6	5	5	5
12/1/2023	fourworker	5	6	5	5	5

Columns:

1. Date
   - must be in first column and labeled “Date”
2. Username
   - This is the users Australia post username, this is set via the Aus post options. Column title must be Username
3. Reconciliation Names
   - 3 and onwards are for setting the rate types to be tracked
   - This is done by the reconciliation name
   - This is set via the rate types, these need to match exactly (case sensitive)

Once the reconciliation sheet has been setup and the backend of the reconciliations linked through you can then upload the csv file via:
https://domain.com/workforce/check-ins/reconciliation/2023-03-23 and create:

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This will run the import and return any errors or issues found during the upload, it will check for things like:

- Wrong username
- Bad date format or missing data
- Bad reconciliation name

Final rules:

1. A user can have one reconciliation per day, meaning all of their data needs to be uploaded inside the same spreadsheet.
    1. Example:
    2. User 1 works in delivery & packing, both of these need to be in the same row on the spreadsheet, they can't be done separately.
    3. The reason it was done this way is if you need to add or remove reconciliation data for a user, i think there would have been more issues if it was additive.

Other notes:

1. You can do multiple dates for the same person, ie a reconciliation could be done at the end of the week for all days worked. Example:

Date	Username	rate_a	rate_b	rate_c	rate_d	rate_e
12/1/2023	One worker	5	6	5	5	5
13/1/2023	One worker	5	6	5	5	5
14/1/2023	One worker	5	6	5	5	5

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