Import & Export Data via Batch Process

Data sharing can be done automatically without human interaction or may require you to manually upload and download files. This guide refers to manual uploads/downloads. To assure that accurate customer and amount-due information is available on PSN for your payers, your customer file data should be uploaded once a day. Then to assure that you have accurate payment information in your accounting software, you should download payment data from PSN each day.

Uploading Customer Data File to PSN (perform daily)

1. Export the data from your software into the PSN-specified file format (contact your Accounting Software provider for details on completing this)
2. Save the file to your computer/server
3. Log onto the PSN Account Management Center
4. Select the manage account tab
5. Select Upload/Download Files
6. Select Upload Customer Files
7. Click on “Browse” and find the export file you saved on your computer/server
8. Click on “Upload”

NOTE: PSN will load your data that night, so updated information will be viewable the next day

Importing Payment Data from PSN

1. Log onto the PSN Account Management Center
2. Select the manage account tab
3. Select Upload/Download Files
4. Select Download Payment Files
5. Click Download next to the payment file you want to download
6. Click Save and save the file to your computer/server
7. Import the payment file from your computer/server into your software (contact your Accounting Software provider for details on completing this)

NOTE: Your customer payment data file will be available for download any time after 7am Eastern (4am Pacific)

Troubleshooting

- ✓ “I don’t see a payment file to download.” Verify that payments were made the day before. In QUICK LINKS, select View Real-Time Customer Payments and select yesterday’s date. If there are no payments, there is no report to download.
- ✓ “I don’t know what PSN-specified file format to use.” Contact your PSN Service Account Manager for the file type.
- ✓ “The customer file I uploaded didn’t update the customer information on PSN.” First, verify the file was processed by going to the manage account tab and seeing if the file appears in the upload list. If it does, the file is “waiting” to be loaded; if it doesn’t appear in the list, contact your PSN Service Account Manager.
- ✓ “Oops, I uploaded the wrong file.” If the file is still “waiting” in the Upload list, simply delete and upload the correct file. If it is not on the list, contact your Service Account Manager.

Still need assistance…

If you require additional help, please submit a TICKET by logging into the PSN Account Management Center; in QUICK LINKS, select “Submit/Monitor Tickets.” Your question will be addressed within one business day.