

All Transactions Dashboard

13 Steps [View most recent version](#) 

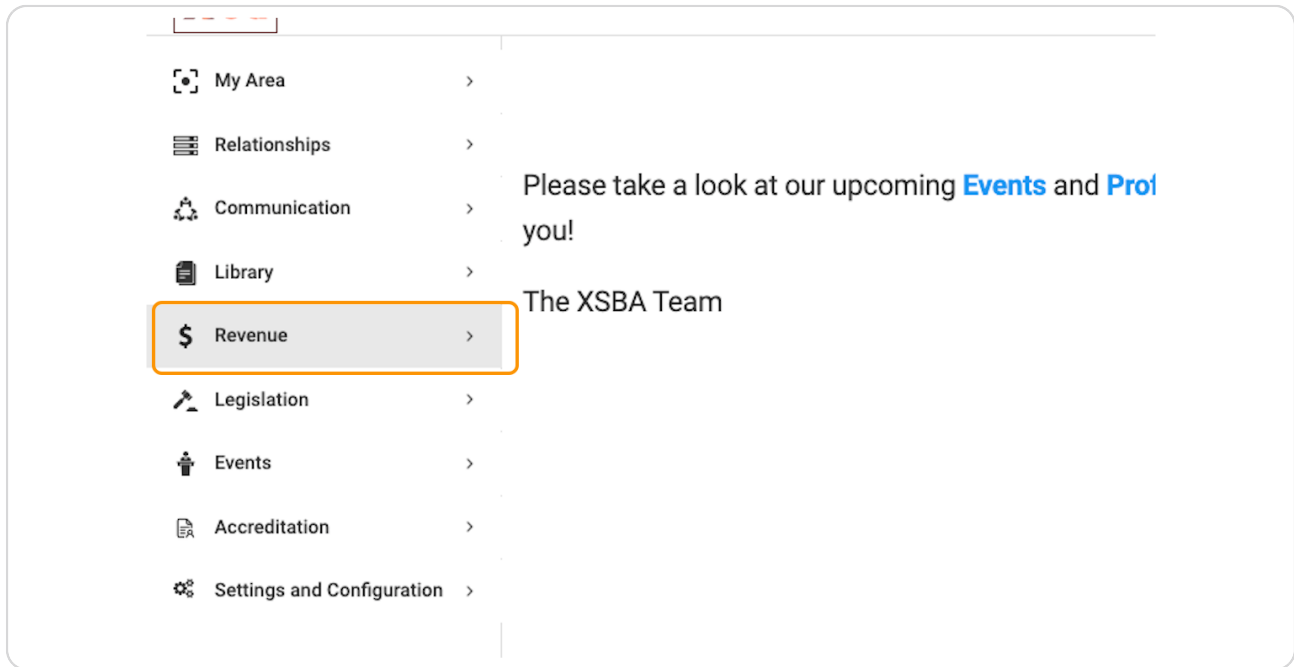
Created by
Engagifii Inc.

Creation Date
November 20, 2023

Last Updated
November 20, 2023

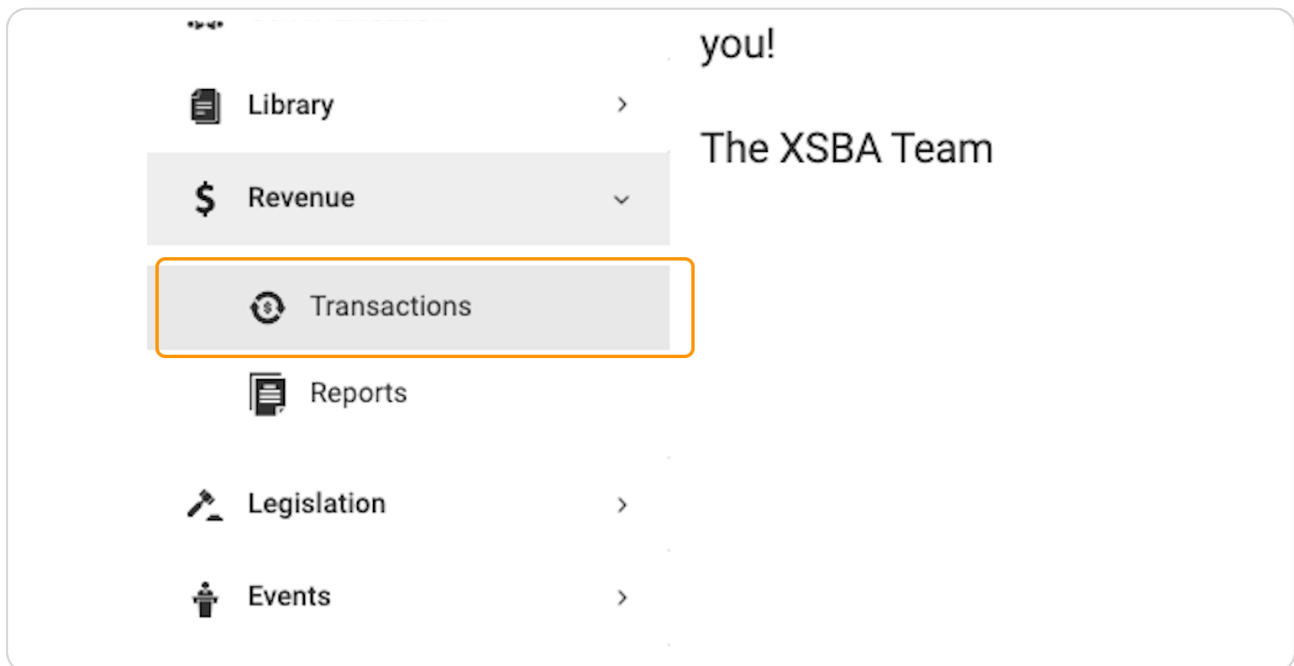
STEP 1

Click on Revenue



STEP 2

Click on Transactions



STEP 3

The Accounting Metrics shows you at a glance the financial stats at glance

The Accounting Metrics dashboard displays the following financial statistics for the last 180 days:

- Invoices:** \$1,470.00
- Payments:** \$0.00
- Due:** \$300.00
- Overdue:** \$620.00
- Credits:** \$550.00 (with sub-totals: \$550.00 Used, \$0.00 Unused)
- Refunds:** \$0.00

Below the metrics is a table of All Transactions (Last 180 days):

Favorite	Type	Search ID	Search Buyer Name or Org Name	Amount	Activity	Status	Payment
<input type="checkbox"/>	Invoice	Inv 10000090	XSBA Crescence Admin	\$300.00		Paid	Invoice Paid
<input type="checkbox"/>	Credit Note	Cn 10000002	XSBA Crescence Admin	\$300.00		Used	
<input type="checkbox"/>	Invoice	Inv 10000091	XSBA Sarah Anderson	\$250.00		Held	
<input type="checkbox"/>	Invoice	Inv 10000089	XSBA Sarah Anderson	\$425.00		Held	
<input type="checkbox"/>	Payment	Pmt 10000028	XSBA Crescence Admin	\$100.00		Failed	

STEP 4

View the All Transactions section to see all the financial transactions associated with your workspace

The All Transactions section displays a detailed list of financial transactions. The table includes the following data:







Favorite	Type	Search ID	Search Buyer Name or Org Name	Amount	Activity	Status	Payment	Invoice: Paid in Full Date	Item Name
<input type="checkbox"/>	Invoice	Inv 10000090	XSBA Crescence Admin	\$300.00		Paid	Invoice Paid	Nov 17, 2023 at 3:11 PM	
<input type="checkbox"/>	Credit Note	Cn 10000002	XSBA Crescence Admin	\$300.00		Used			
<input type="checkbox"/>	Invoice	Inv 10000091	XSBA Sarah Anderson	\$250.00		Held			
<input type="checkbox"/>	Invoice	Inv 10000089	XSBA Sarah Anderson	\$425.00		Held			
<input type="checkbox"/>	Payment	Pmt 10000028	XSBA Crescence Admin	\$100.00		Failed			
<input type="checkbox"/>	Invoice	Inv 10000088	XSBA Christian Brown	\$100.00		Unpaid Due	Record Payment		
<input type="checkbox"/>	Invoice	Inv 10000087	XSBA Crescence Admin	\$100.00		Unpaid Due	Record Payment		
<input type="checkbox"/>	Invoice	Inv 10000086	XSBA Crescence Admin	\$100.00		Unpaid Due	Record Payment		
<input type="checkbox"/>	Invoice	Inv 10000085	Yukon School District Crescence Admin	\$0.00		Paid	Invoice Paid		
<input type="checkbox"/>	Invoice	Inv 10000079	Yukon School District Laura Heers	\$870.00		Partial Paid Overdue	Record Payment		10 Items
<input type="checkbox"/>	Credit Note	Cn 10000001	Yukon School District Laura Heers	\$250.00		Used			

STEP 5

Search for transactions by Invoice, Credit Note or Payment ID or by buyer or organization name

Add Transaction ▾

Search ID Search Buyer Name or Org Name ⇅ Ar

	Inv 10000090		XSBA Crescerance Admin	\$3
	Cn 10000002		XSBA Crescerance Admin	\$3
	Inv 10000091		XSBA Sarah Anderson	\$2

STEP 6

Click on the three dots to send a reminder for payment email

Transactions

Reports

Legislation >

Events >









Accreditation >

Settings and Configuration >

\$0.00 Unused

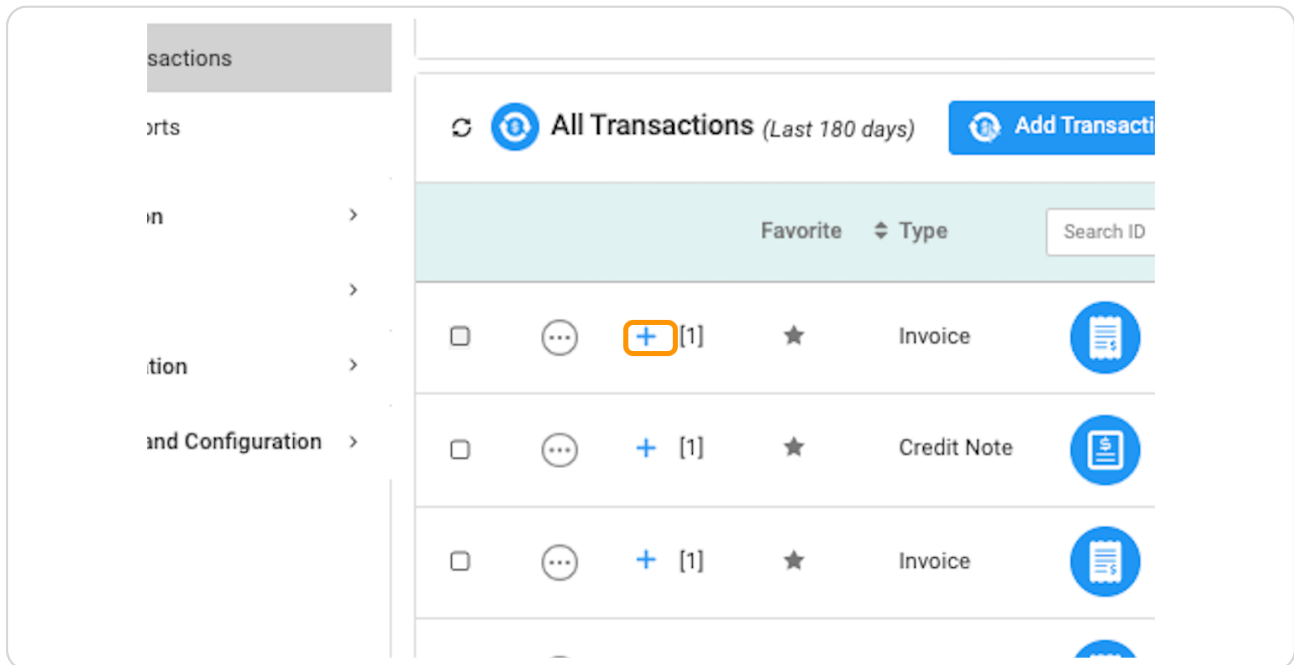
All Transactions (Last 180 days) **Add Transaction**

Favorite ⇅ Type Search ID

<input type="checkbox"/>		+ [1]	★	Invoice	
<input type="checkbox"/>		+ [1]	★	Credit Note	
<input type="checkbox"/>		+ [1]	★	Invoice	
<input type="checkbox"/>		+ [1]	★	Invoice	

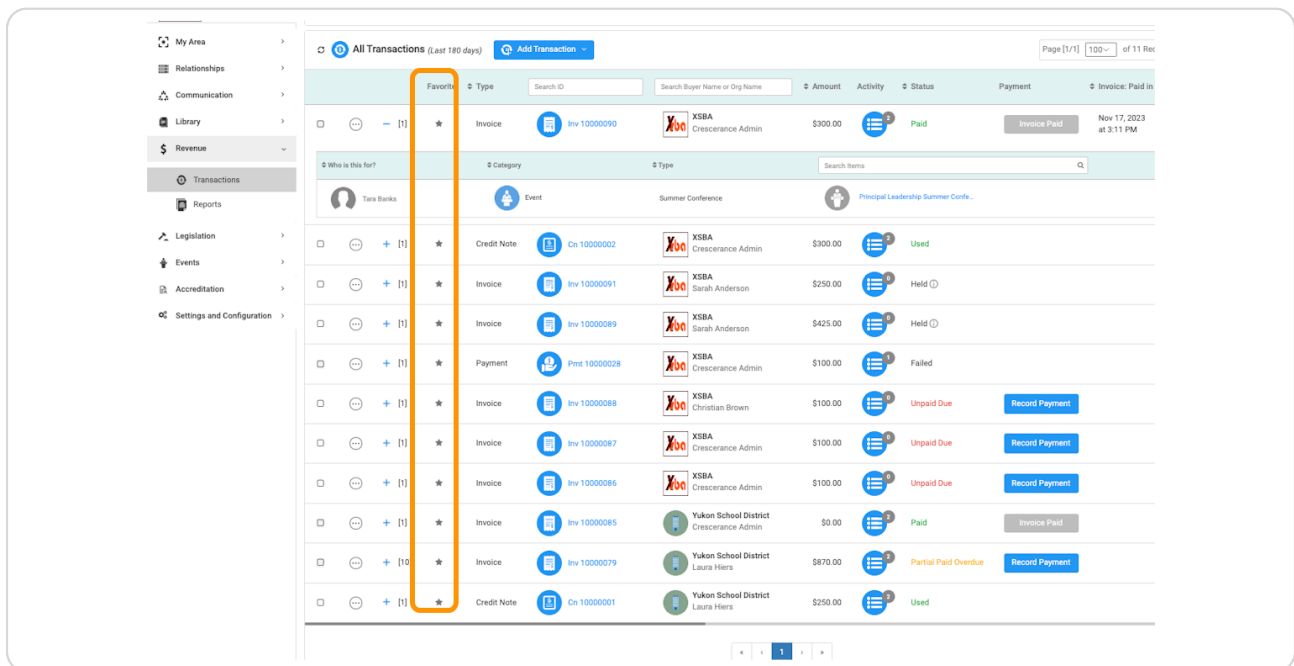
STEP 7

Click on the plus sign to view registrant details



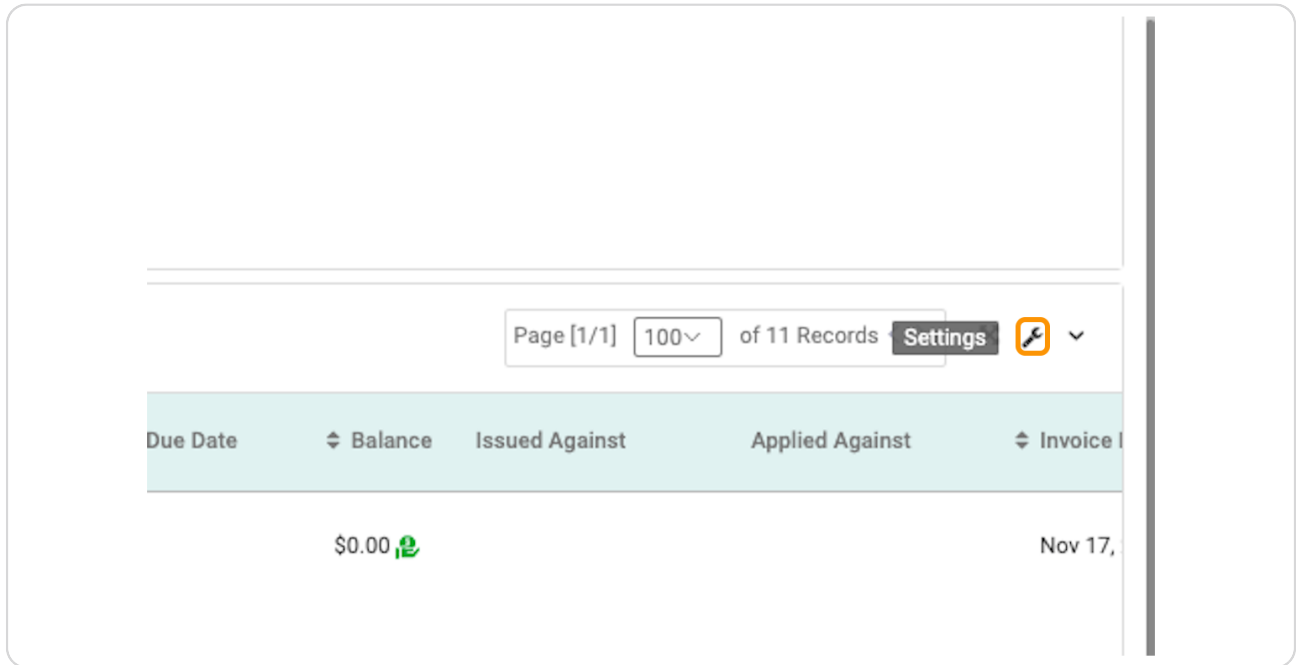
STEP 8

Click on the star icon to mark a transaction as a favorite



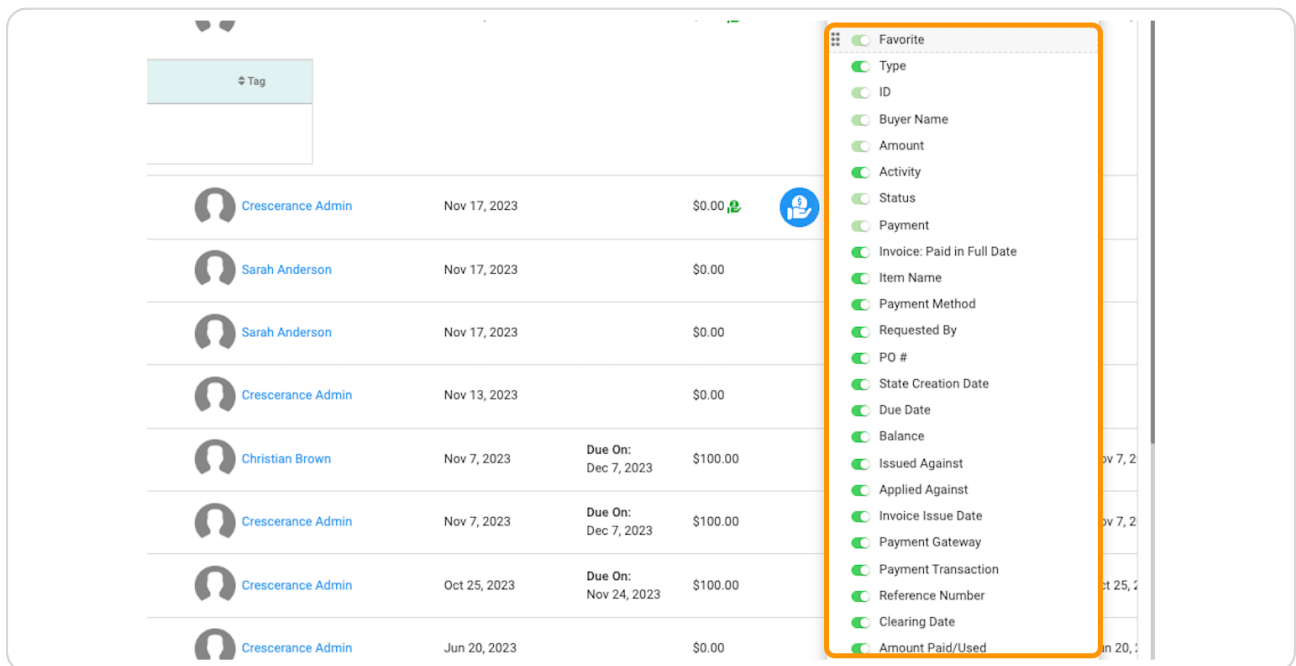
STEP 9

Click on the wrench icon to change the view of the columns displayed



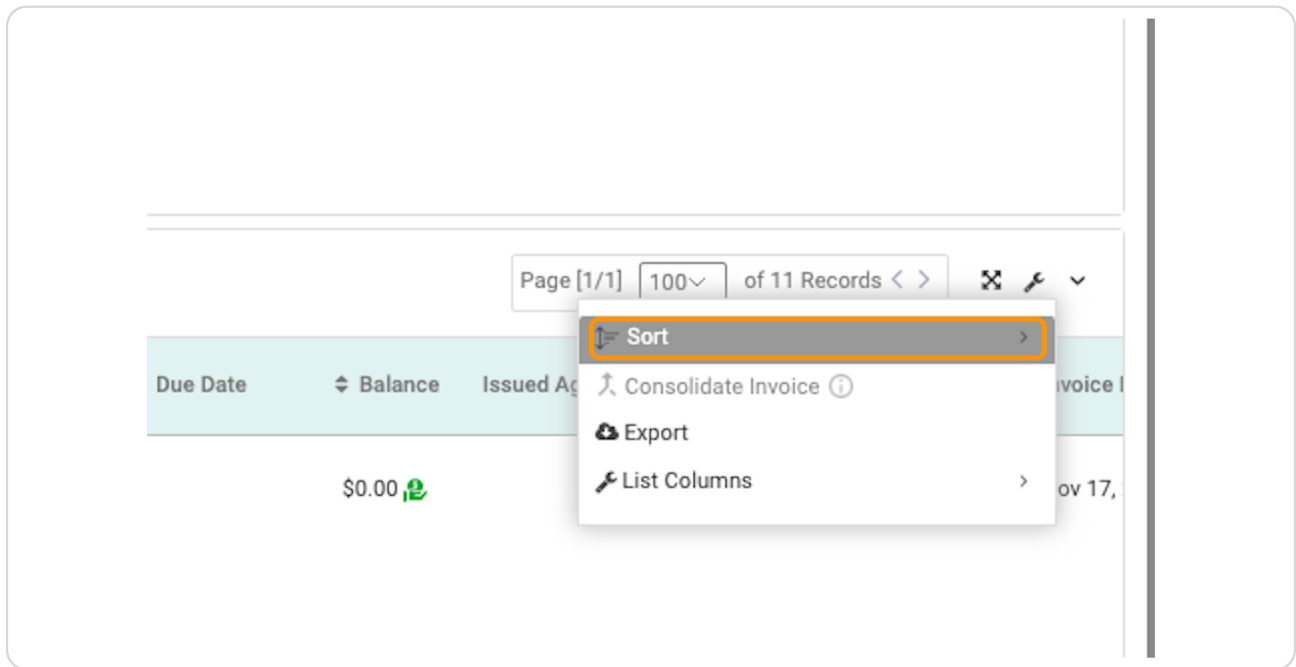
STEP 10

Click on List Columns to toggle on/off columns from view



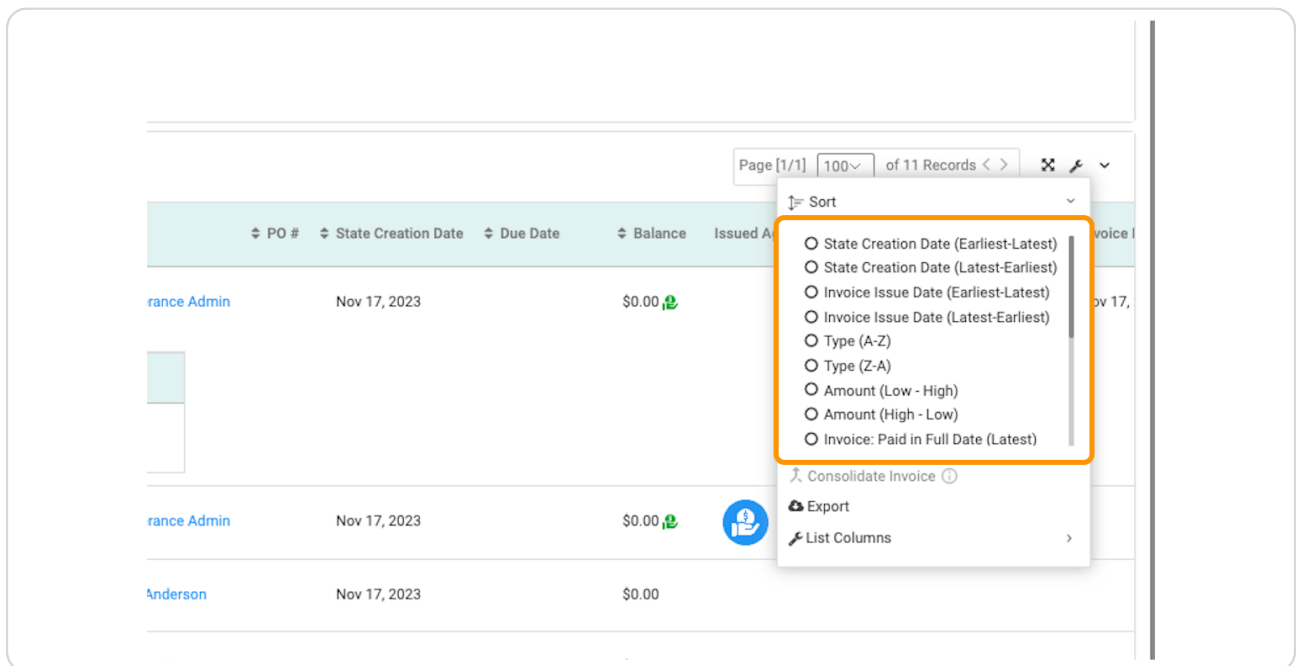
STEP 11

Click on Sort to sort your transactions



STEP 12

Click on the preferred sort option



STEP 13

Click on Export to download to an Excel file

