All Transactions Dashboard

13 Steps

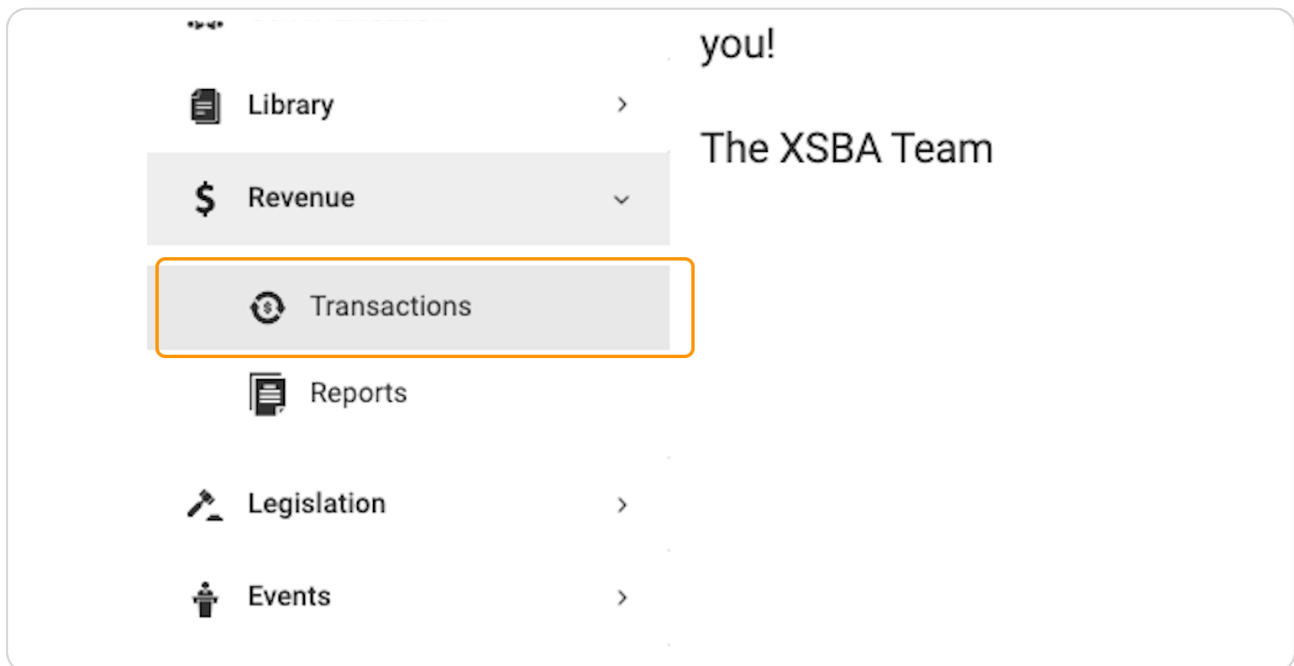| Created by	Creation Date	Last Updated
Engagifii Inc.	November 20, 2023	November 20, 2023

STEP 1

Click on Revenue
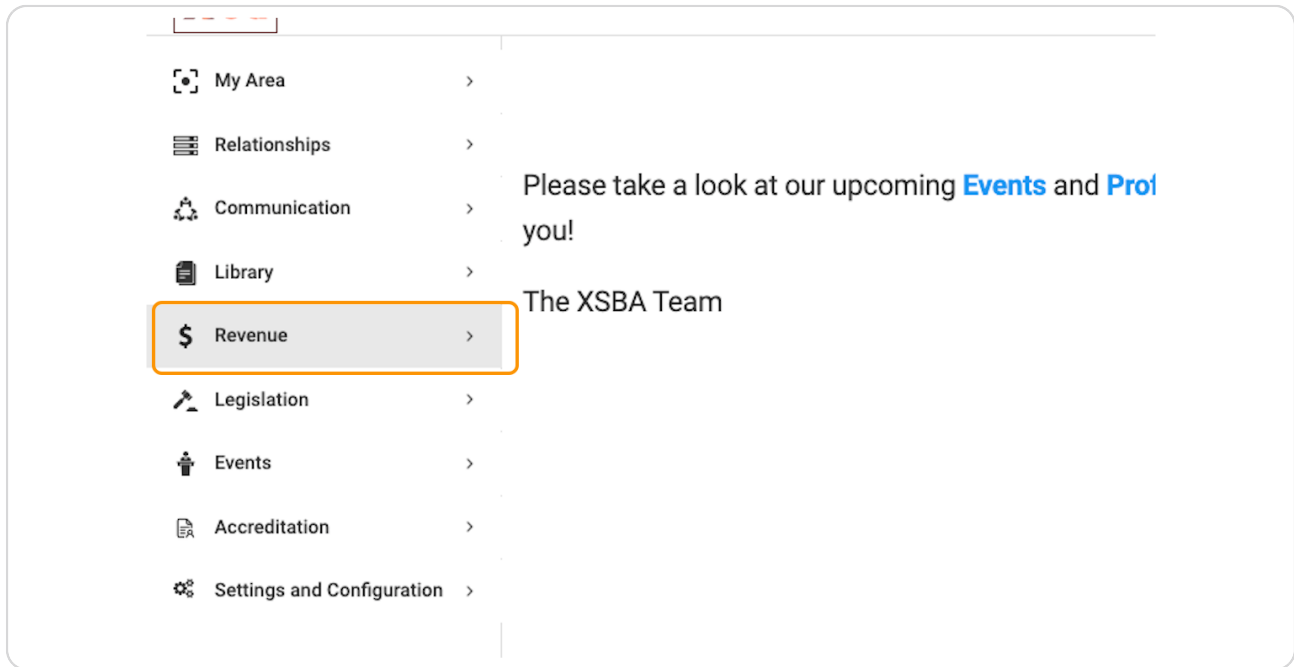
STEP 2

Click on Transactions

STEP 3

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

STEP 4

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

STEP 5

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

STEP 6

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

STEP 7

Click on the plus sign to view registrant details
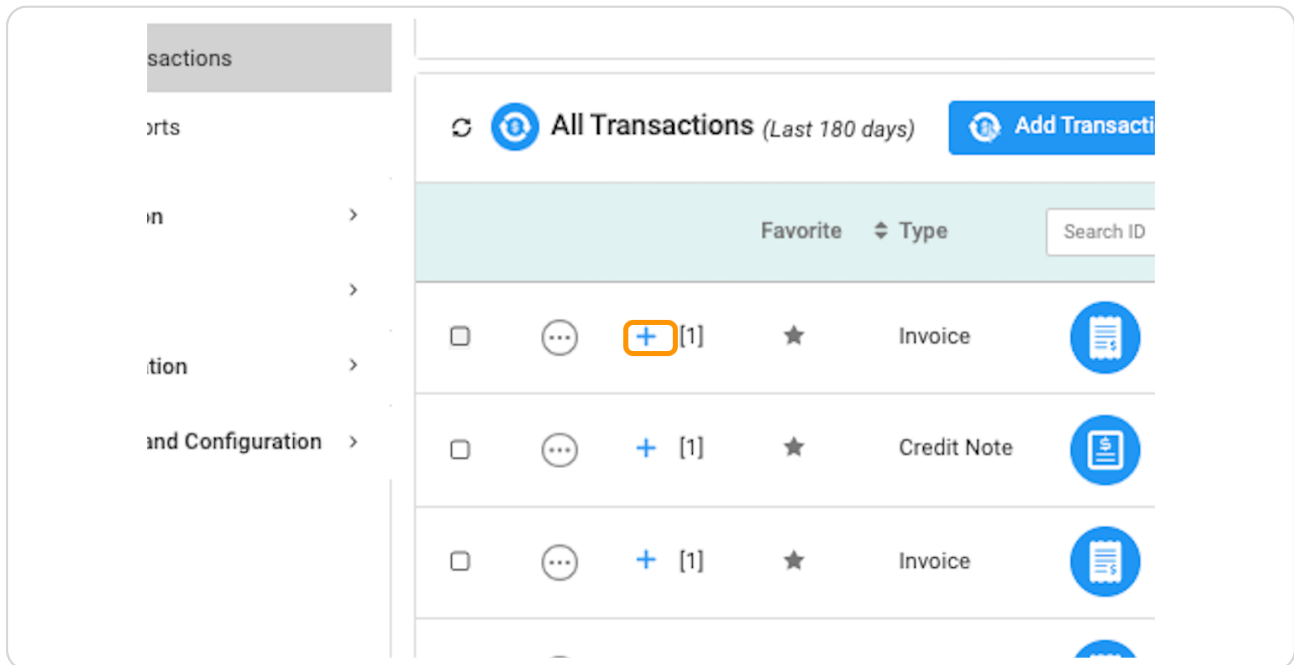
STEP 8

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
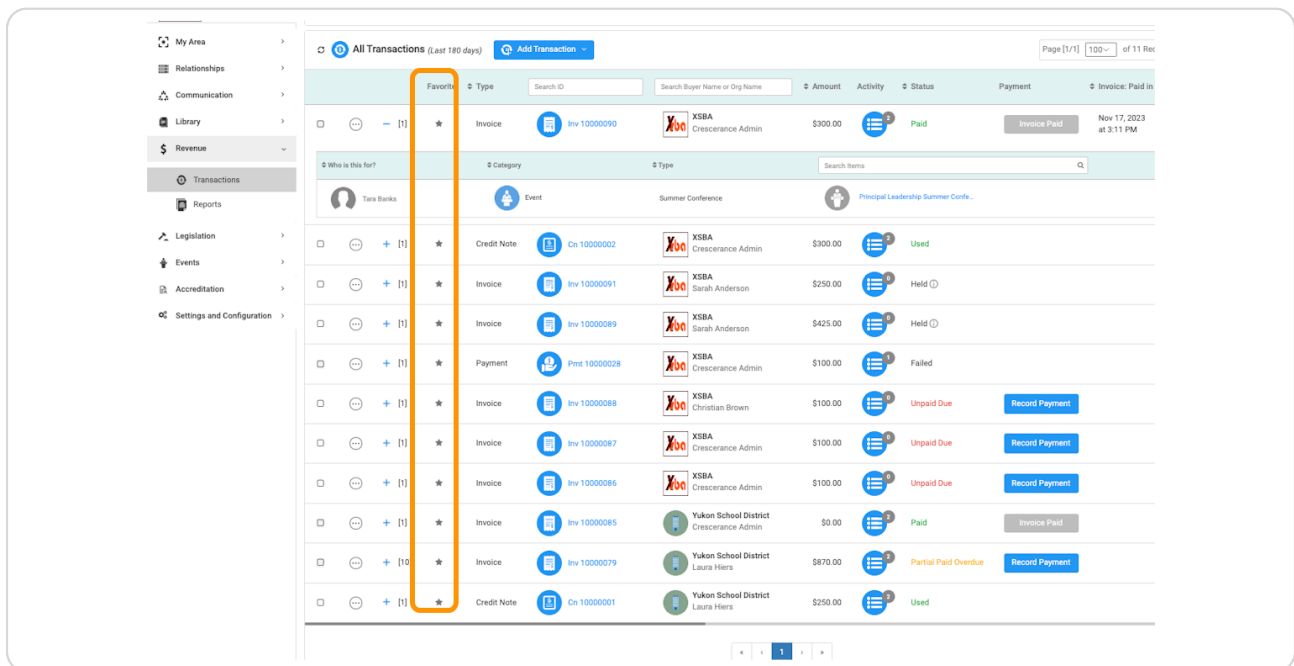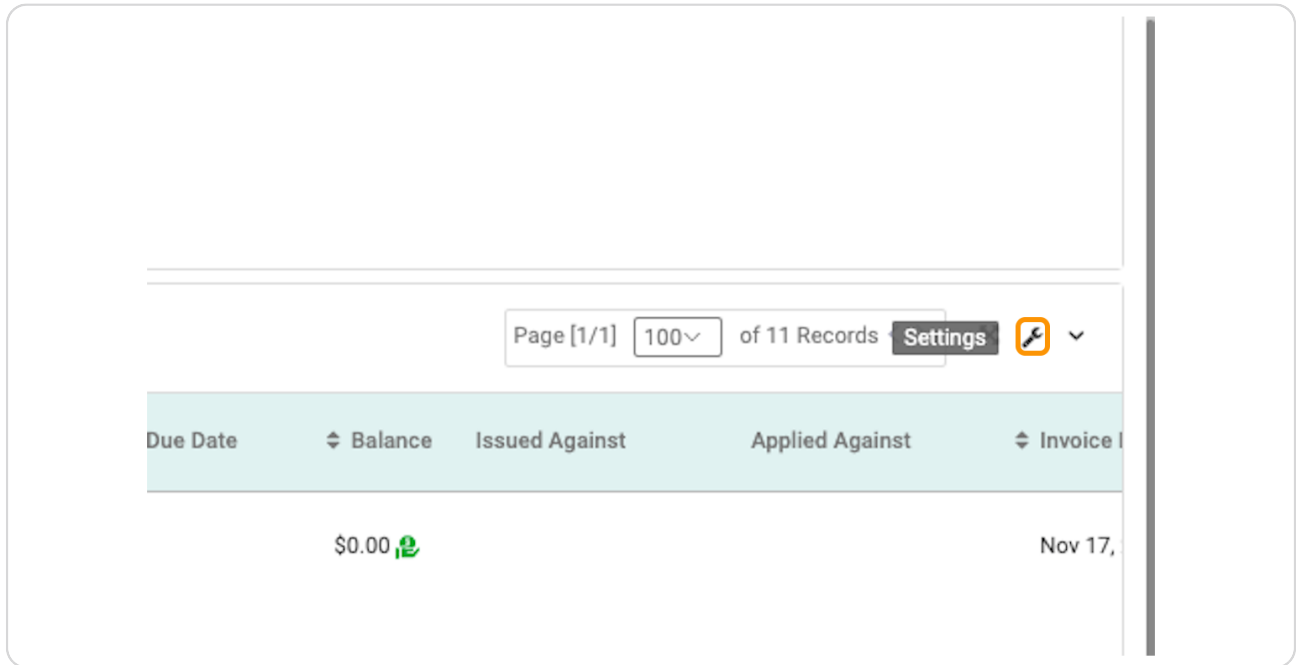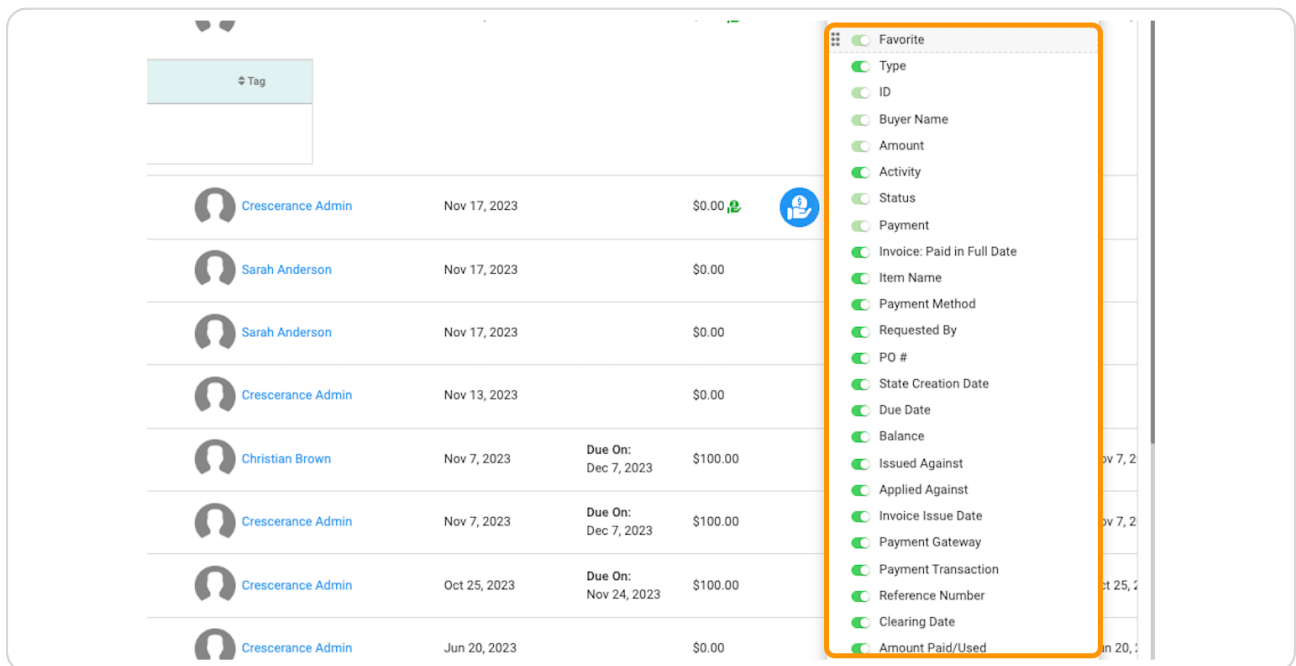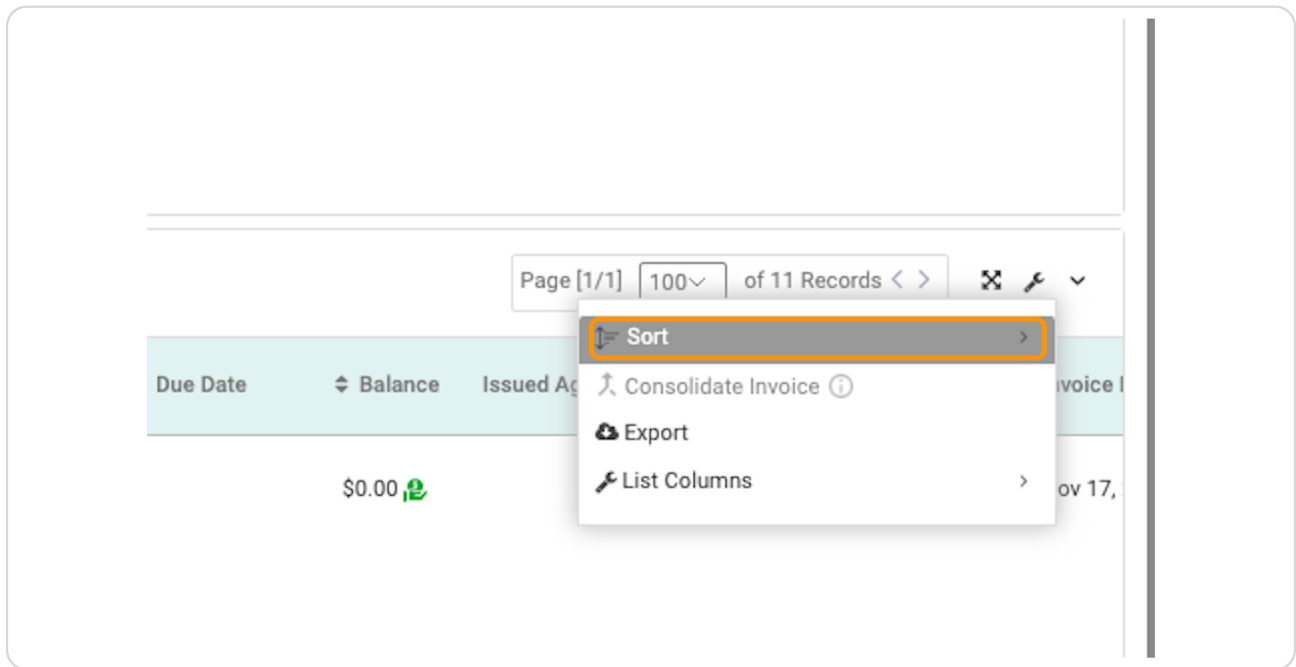

STEP 10

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

STEP 11

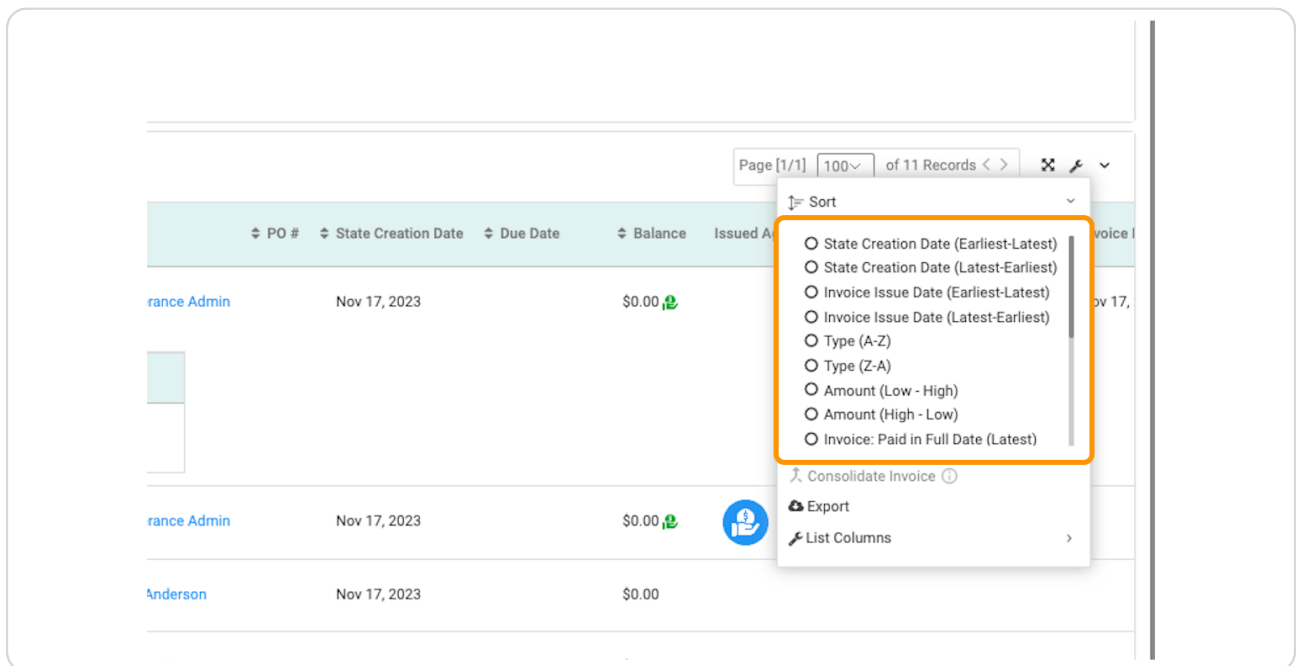# Click on Sort to sort your transactions

STEP 12

Click on the preferred sort option

Click on Export to download to an Excel file