

View Transactions and Associated Items

5 Steps [View most recent version](#) 

Created by
Engagifii Inc.

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November 21, 2023

STEP 1

Click on Revenue and then Transactions

The screenshot shows a dashboard with three summary boxes at the top: 'Payments' (green border), 'Due' (orange border), and 'Overdue' (red border). Below these is a navigation bar with a '30 days' filter and an 'Add Transaction' button. A table below the navigation bar has columns for 'Type', 'Search ID', 'Search Buyer Name or Org Name', 'Amount', 'Activity', 'Status', and 'Payment'. A transaction is listed with the following details:

Type	Search ID	Search Buyer Name or Org Name	Amount	Activity	Status	Payment
Invoice	Inv 10000090	Xsba Crescerance Admin	\$300.00		Paid	Invoice Paid

STEP 2

You can filter transaction records from the past 7, 30, 90, 180 days or set a custom date range

The screenshot shows a dropdown menu for 'View records for:' with the following options:

- Last 180 days
- Last 7 days
- Last 30 days
- Last 90 days
- Last 180 days
- Custom Date (Date range - 90 days(max))

Below the dropdown, a summary box shows a total of \$550.00 and a 'Credits' section with '\$550.00 Used' and '\$0.00 Unused'.

STEP 3

Click on the specific invoice you wish to view

30 days) [Add Transaction](#)

Type	Search ID	Search Buyer Name or Org Name	Amount	Activity	Status	Payment
Invoice	inv 10000090	XSBA Crescerance Admin	\$300.00	2	Paid	Invoice Paid
		XSBA		2		

STEP 4

Click on Associated Items to other items related to this invoice

Phone
(123) 654-7891

STEP 5

You will be routed to the associated items for that invoice

INVOICE# Inv 10000090 PAID To XSBA \$300.00 PAID ON FRI, 17 NOV, 2023 3:11 PM

Customer: XSBA Requested By: Crescerance Admin Payment Term: Net 30

Billing Information

Email: info@xamplesba.org Phone: (123) 654-7891

Address: 600 Galleria Parkway, Atlanta, GA, USA
Galleria Parkway
Atlanta, Georgia 30339
United States

Alex Administrator-XSBA
Position: Board Secretary
Department:
Phone:
Email: alexadminxsba@yopmail.com

General **Activity** **Associated Items**

#	Date	Type	Item Id	Created By	Payment Method	Total Amount	Applied Amount
1	Nov 17, 2023	Credit Note	Cn 10000002	Crescerance Admin		\$300.00	\$300.00

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