

Viewing Transactions and Invoice Details

9 Steps [View most recent version](#) 

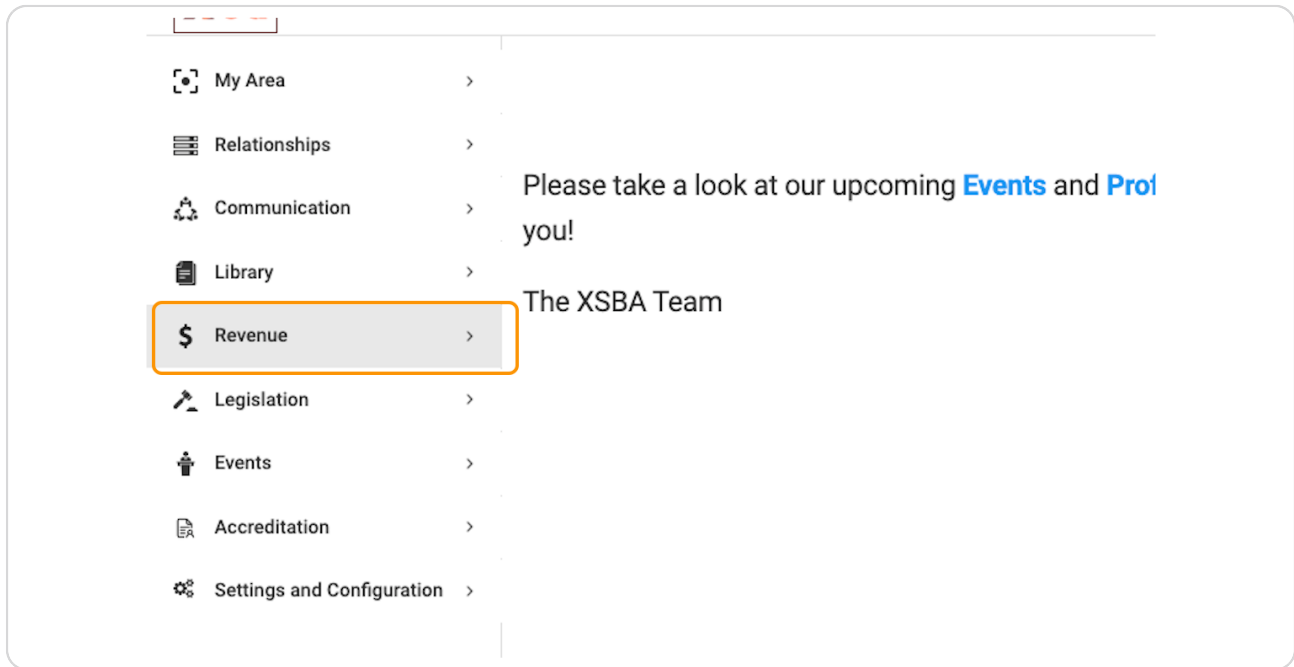
Created by
Engagifii Inc.

Creation Date
November 17, 2023

Last Updated
November 17, 2023

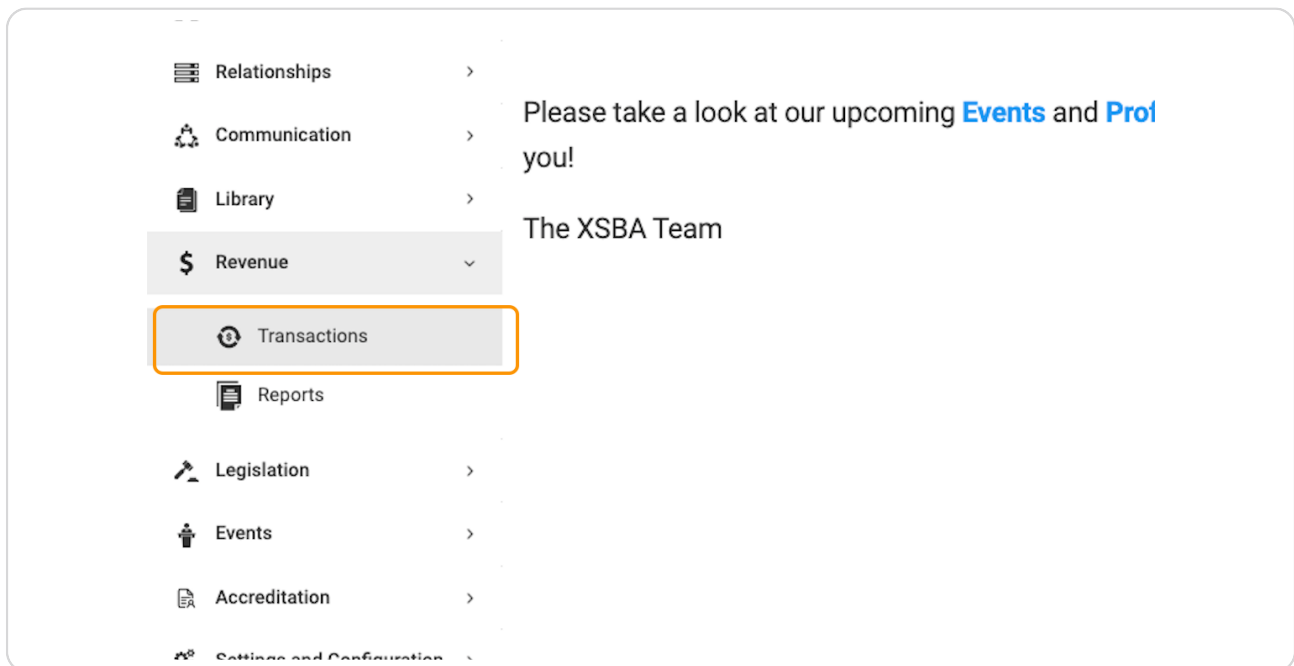
STEP 1

Click on Revenue



STEP 2

Click on Transactions



STEP 3

Here you will see all of your invoices and their statuses

The screenshot shows the 'All Transactions' page in the Xba system. The page title is 'All Transactions (Last 180 days)' with an 'Add Transaction' button. The table below lists various transactions:

Favorite	Type	ID	Buyer Name	Amount	Activity	Status
☐	Invoice	Inv 10000090	XSBA Crescance Admin	\$300.00	📄	Paid
☐	Credit Note	Cn 10000002	XSBA Crescance Admin	\$300.00	📄	Used
☐	Invoice	Inv 10000091	XSBA Sarah Anderson	\$250.00	📄	Held
☐	Invoice	Inv 10000089	XSBA Sarah Anderson	\$425.00	📄	Held
☐	Payment	Pmt 10000028	XSBA Crescance Admin	\$100.00	📄	Failed
☐	Invoice	Inv 10000088	XSBA Christian Brown	\$100.00	📄	Unpaid Due
☐	Invoice	Inv 10000087	XSBA Crescance Admin	\$100.00	📄	Unpaid Due
☐	Invoice	Inv 10000086	XSBA Crescance Admin	\$100.00	📄	Unpaid Due
☐	Invoice	Inv 10000085	Yukon School District Crescance Admin	\$0.00	📄	Paid
☐	Invoice	Inv 10000079	Yukon School District Laura Hiers	\$870.00	📄	Partial Paid Overdue
☐	Credit Note	Cn 10000001	Yukon School District Laura Hiers	\$250.00	📄	Used

STEP 4

Click on an invoice to view the details

The screenshot shows the details for invoice 'INV# Inv 10000085'. The status is 'PAID' with a note: 'PAID Yukon School District \$0.00 PAID ON TUE, 20 JUN, 2023 9:37 AM'. The customer is 'Yukon School District' and the requested by is 'Crescance Admin'. The payment term is 'Net 30'.

Billing Information

Email: Phone: Address: Metro RESA Office, 1870 Teasley Drive, Cobb County, Smyrna, GA, 30080, United States.

Customer Contact: Luke Dutton, Position: Board Member, Department: Administration, Phone: Email: Lukedutton.xba@yopmail.com

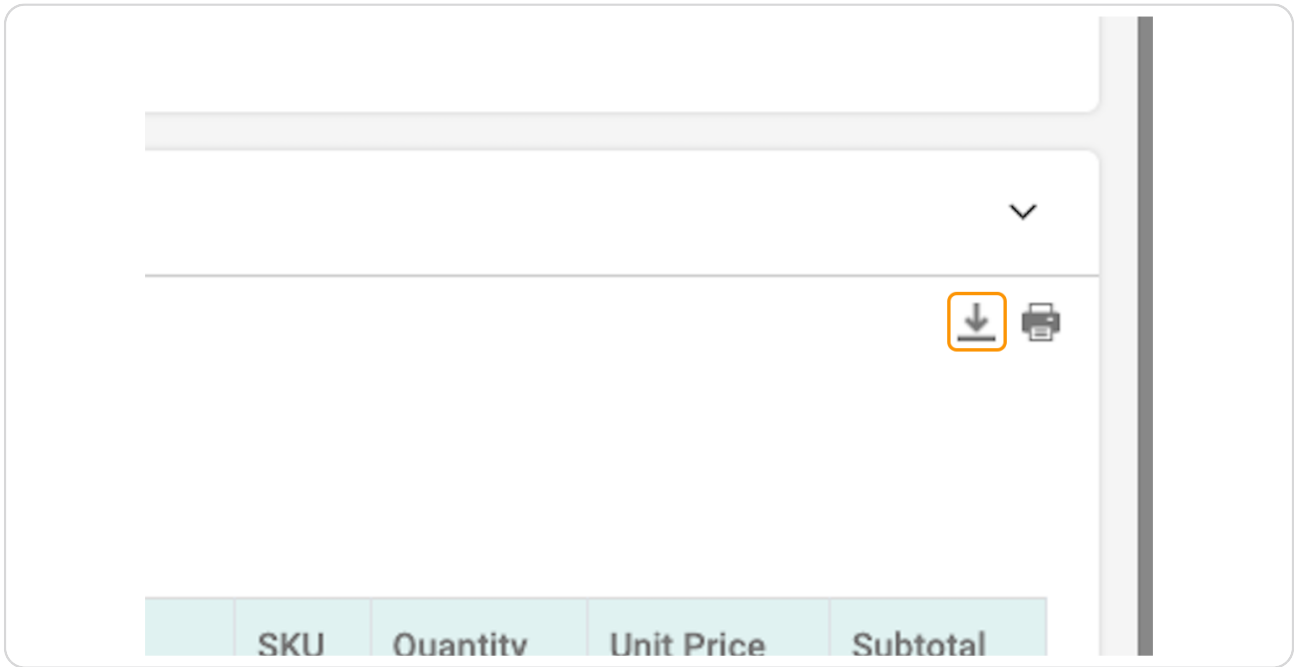
General

Invoice Date and Time: Jun 20, 2023 09:37 AM

#	Who is this for?	Name	Category	Description	SKU	Quantity	Unit Price	Subtotal
1	Elle Woods	New Board Member Orientation	Event			1	\$0.00	\$0.00
								Subtotal: \$0.00
								Total: \$0.00

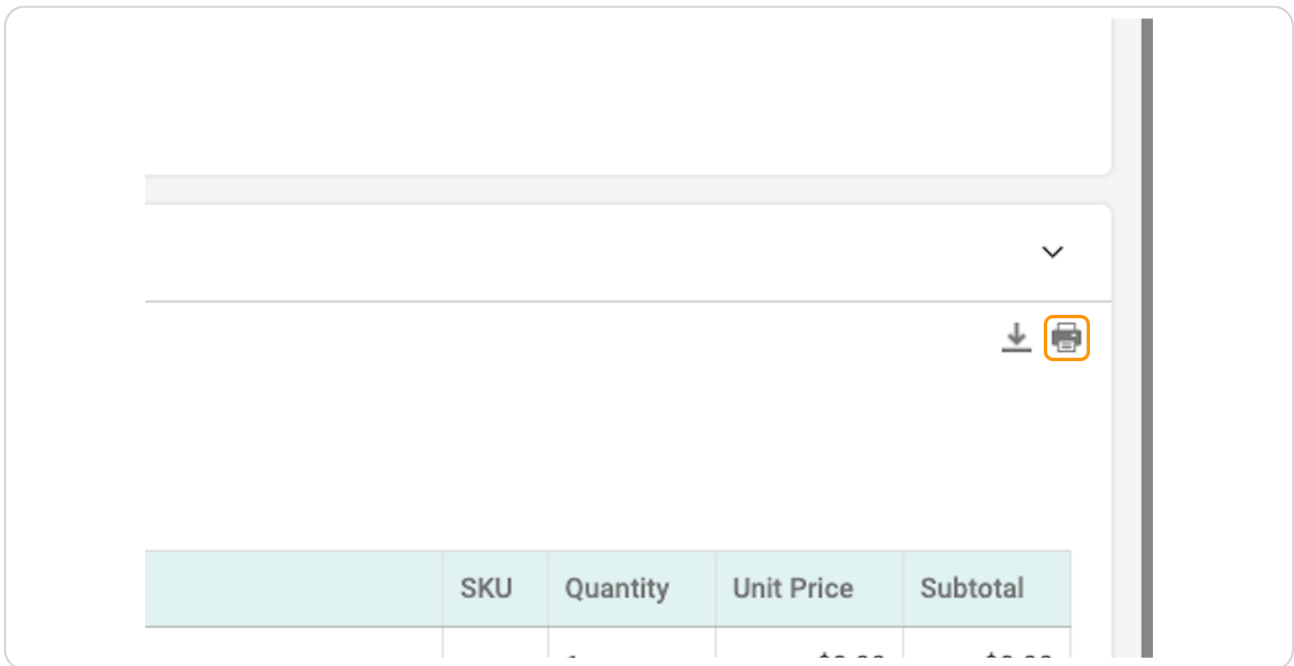
STEP 5

Click on download icon to download a copy of the invoice



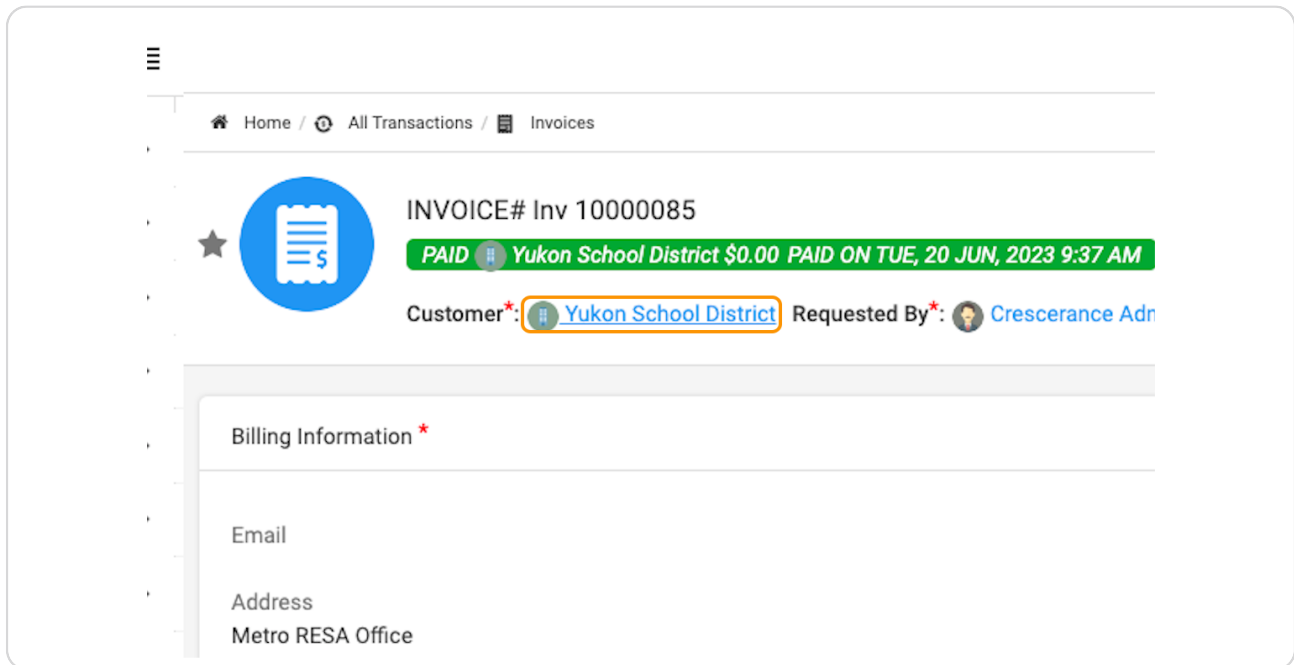
STEP 6

Click on the printer icon to print a copy of the invoice



STEP 7

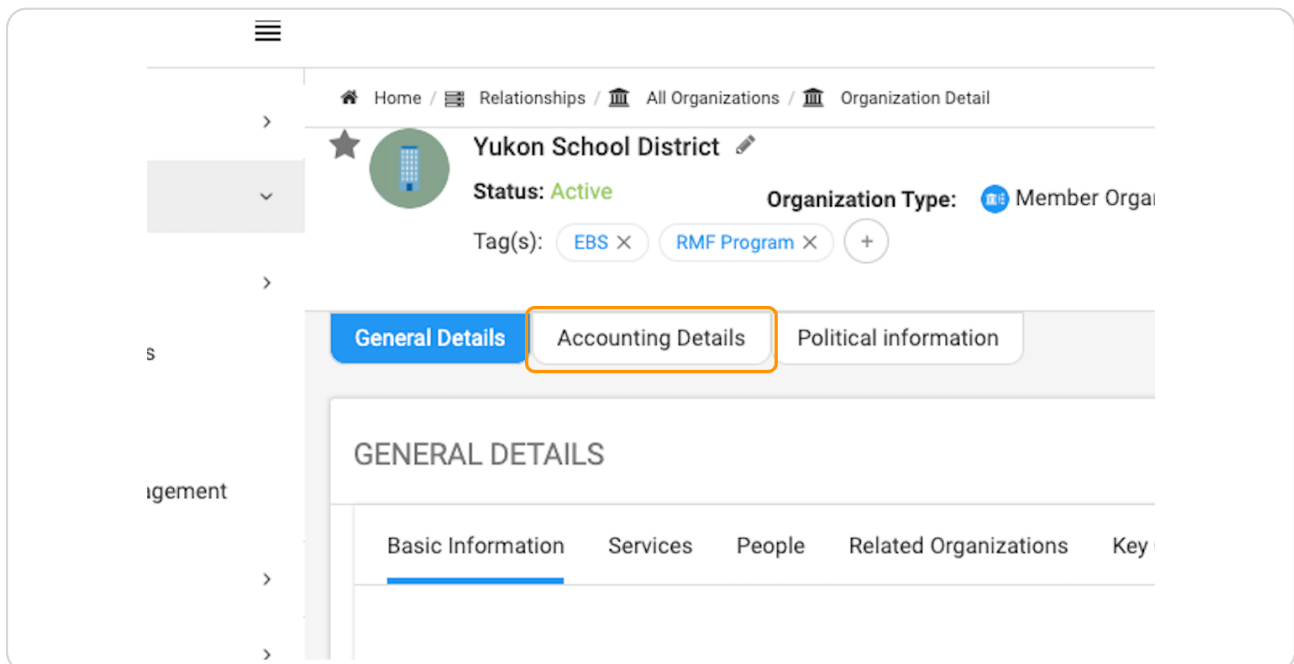
To view all invoices for an organization, click on the organization name



The screenshot shows a web interface for viewing an invoice. At the top, there is a breadcrumb trail: Home / All Transactions / Invoices. Below this, a blue circular icon with a white document and a dollar sign represents the invoice. To its right, the text reads "INVOICE# Inv 10000085". A green banner below the invoice number states "PAID Yukon School District \$0.00 PAID ON TUE, 20 JUN, 2023 9:37 AM". Underneath, the "Customer" is listed as "Yukon School District" (highlighted with an orange box) and "Requested By" is "Crescerance Adr". A sidebar on the left contains a menu with items: Billing Information*, Email, Address, and Metro RESA Office.

STEP 8

Click on the Accounting Details tab



The screenshot displays the "Organization Detail" page for "Yukon School District". The breadcrumb trail is Home / Relationships / All Organizations / Organization Detail. The organization's status is "Active" and its type is "Member Orga". It has two tags: "EBS" and "RMF Program". A horizontal tab bar at the bottom of the header section includes "General Details", "Accounting Details" (highlighted with an orange box), and "Political information". Below the tabs, the "GENERAL DETAILS" section is visible, with sub-tabs for "Basic Information", "Services", "People", "Related Organizations", and "Key".

STEP 9

Here you will see all financial transactions for that organization

You can click into the individual invoices to open up for full details

The screenshot shows the Xba software interface for Yukon School District. The left sidebar contains navigation options: My Area, Relationships, People, Organizations, Committees, Groups Management, Communication, Library, Revenue, Legislation, Events, Accreditation, and Settings and Configuration. The main content area displays a table of financial transactions for the organization. At the top, it shows 'Yukon School District' with status 'Active' and organization type 'Member Organization'. A summary bar indicates '\$165.00 Unused'. The table has columns for checkboxes, counts, stars, dates, types, IDs, balances, and amounts. A red box highlights the first row of the table.

<input type="checkbox"/>	+ [1]	★	Jun 20, 2023	Invoice	Inv 10000085	\$0.00			\$0.00
<input type="checkbox"/>	+ [10]	★	Jun 20, 2023	Overdue On: Nov 13, 2022 Invoice	Inv 10000079	\$620.00			\$870.00
<input type="checkbox"/>	+ [1]	★	Jun 20, 2023	Credit Note	Cn 10000001	\$0.00		Inv 10000079	\$250.00
<input type="checkbox"/>	+ [2]	★	Nov 16, 2022	Invoice	Inv 10000082	\$0.00			\$10.00
<input type="checkbox"/>	+ [1]	★	Nov 16, 2022	Payment	Pmt 10000026	\$0.00			\$10.00
<input type="checkbox"/>	+ [4]	★	Oct 14, 2022	Overdue On: Nov 13, 2022 Invoice	Inv 10000078	\$310.00			\$310.00
<input type="checkbox"/>	+ [1]	★	Sep 27, 2022	Overdue On: Oct 27, 2022 Invoice	Inv 10000077	\$25.00			\$25.00
<input type="checkbox"/>	+ [0]	★	Sep 9, 2022	Credit Note	Cn 1	\$165.00		Pmt 10000017	\$165.00
<input type="checkbox"/>	+ [3]	★	Sep 9, 2022	Invoice	Inv 10000061	\$0.00			\$60.00
<input type="checkbox"/>	+ [3]	★	Sep 9, 2022	Invoice	Inv 10000065	\$0.00			\$525.00

