Client Disbursements Transactions – Summary Screen

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Business Purpose:

The **Transaction Summary** page displays a summary view of a disbursement transaction. The summary header shows the **Transaction Date**, **ID**, **User**, **Paid Type,** (**Cheque No., Cheque Pay To**) and **Signature.** The bottom part of the page shows a listing with columns for **Client** name, **Program** name, **Disbursement Type**, **Unit**, **Unit Rate** and **Total** $ amounts.

How to:

1. In the **Transaction History** tab, click on Summary in any Transaction History record under the **Actions** column, to go to the **Transaction Summary** screen.

2. Click on any column heading to sort the data accordingly, first in ascending order then descending order.

3. Click on the Receipt action button to print a receipt/Transaction Statement in pdf format.

4. Click on the View Signature button to view the client signature in a popup window.

5. Click on the Back to Transaction History action button to go back to the **Transaction History** screen.

Important Notes:

1. *Cheque No.* and *Cheque Pay To* fields are shown in the top portion of the screen, only if the Transaction is Cheque based.

2. Signature can be view only if the client has already signed for the transaction before.