Client Disbursement Summary Screen

Updated on August 2016

Home > Client Management (Search Client) > Summary/Detail > Summary

Business Purpose:

The **Disbursement Summary** page displays a summary listing of the client's financial disbursement records for one particular programs and one particular disbursement type.

How to:

1. From the Disbursement Summary/Detail page, click on the Summary **View By** action button of a record to come to this Summary listing. The **Transaction Date**, **ID**, **Transaction Type** and **Total** $ amount are listed for each Transaction for this particular **Program** and Disbursement **Type** combination.

2. Click on View to see the transaction details.

3. Each of the column headings, except **View By** are clickable and will execute a sort alternating between ascending and descending based upon the column heading. (For example, when you click on the **Transaction Date**, the transaction records are then sorted in ascending order, with the oldest **Transaction Date** first.)

4. To filter a new search, enter the transaction Date Range From date and To date using the calendar icons. Then click on the search button.

5. Click on the Back to Summary/Detail action button to go back to Disbursement Summary/Detail screen.

Important Notes:

1. The total number of records is shown at the bottom of every page.

2. The paging options are also shown at the bottom of every page.

3. The disbursement **Type** can be for PNA, FOOD or CSF (Client Safekeeping Fund).