Client Disbursements Transactions Screen

Updated on February 2017

Home > Client Management (Search Client) > Transactions

Business Purpose:

The (Disbursements) **Transaction History** page displays a tabular listing of a client's financial disbursement transaction history records for all programs the user has access to.

How to:

1. For each disbursement transaction history record, the **Transaction Date, ID, User, Transaction Type, Paid Type, Amount** and **Actions** columns are displayed. The **Actions** column contains a Summary and Detail button for each record.

2. To view the summary of each disbursement record, simply click on the Summary **Actions** action button of the record.

3. To view the details of each disbursement record, simply click on the Detail **Actions** action button of the record.

4. Each of the column headings, except **Actions,** 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.)
5. Click on the New Transaction action button to create a new transaction for the Client.

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 **Paid Type** can be for CHEQUE or CASH.