Client Disbursement Summary/Detail Screen

Updated on August 2016

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

Business Purpose:

The **Disbursement Summary/Detail** page displays a tabular listing of the client's financial disbursement summary and detail history records for all programs the user has access to.

How to:

1. For each disbursement history record, the **Program Name**, disbursement **Type**, **Last Transaction Date** and **View By** columns are displayed. The **View By** column contains a Summary and Detail button for each record.

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

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

4. 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 **Last Transaction Date**, the transaction records are then sorted in ascending order, with the oldest **Last Transaction Date** first.)

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 of CSF (Client Safekeeping Fund).