Viewing Transactions and Creating Queries

Viewing Transactions

There are three ways to find and review transactions.

Locate transactions from the transaction list: select Transactions > Manage. The Transaction List screen displays transactions for the last 30 days.

You can also find transactions using an existing (saved) query: select Transactions > Manage, and select an existing query from the drop-down list next to the Set as Default Query link.

A more specific way to locate transactions based on the criteria you define by creating a new query. Finding a transaction this way locates just those transactions you need.

Follow the steps below to create a new query to view transactions:

1. Perform a new query to locate the specific transactions. Select Transactions > Query.
2. Enter your date range:
   - **Field**: You can select Post Date or Transaction Date from the drop-down list.
   - **Operation**: Select the criteria to measure the field value. The operations that display vary based on the selected field. For example, Is Relative is a relative date range or a period of time that is relative to the current date, e.g., Last Week is a relative date range.
   - **Value**: Enter or select the value in the appropriate boxes. Dates should be in the MM/DD/YYYY format.
3. Enter your criteria:
   - **Field**: Available fields are listed in alphabetical order. Select a field from the drop-down.
   - **Operation**: Select the criteria to measure the field value. The operations that display vary based on the selected field.
   - **Value**: Enter or select the value in the appropriate boxes. Dates should be in the MM/DD/YYYY format.
4. If additional rows of criteria are needed, click the **Plus** [+] icon.
   To delete a row of criteria, click the **Trash Can** icon.

5. In the **Order By** section, set the data columns in a specific order:
   a. Click the **Plus** [+] icon.
   b. Select the field.
   c. Select the order sequence.
6. Click the **Process** button to run the query. Query results display on the **Transaction List** screen.
7. Click the **Save Query** link located next to the default query drop-down list.
8. Enter the name you want for this query in the text field.
9. Click **Save**. The saved query is now available from the **Save Query** drop-down list.
10. Click the transaction you want to view.

11. On the **Transaction Detail** screen, select the appropriate tab to view additional information:
    - **General Information**: Manage transaction details such as approving transactions, and applying accounting codes.
    - **Receipts**: Attach or fax receipts if your organization has receipt imaging enabled.
    - **Addendum**: Review details such as a tracking number associated with an order and the anticipated delivery date.
    - **History**: Review additional transaction audit data.

Note: Additional information on transactions may be available if icons are displayed on the Transaction List. Click the icon to view the detail.