

Transaction listing

How to view details of all your member transactions –

This tutorial will show you how you can view details of all your member transactions.

1. To view a range of financial transactions that has occurred **select 'Member processing'** and then **'transactions'** from the left hand menu.
2. **Select a Club Membership Year** from the drop down list.
3. You can choose to view transactions for a specific Membership Type by selecting it from the drop down list **labelled 'Membership Type'** or you can leave this set at 'All Membership Types' to view all the transactions in the Membership Year. If you want to view all the transactions that have occurred for the current membership year leave the drop down list set at **'All membership types'**.
4. **Enter from** and **to date**. Dates can be entered using the text box in the formats shown or by using the show calendar to select the date. **Important:** You can use the transaction table to run the date range of invoices you have received from the state association, as it gives you a detailed breakdown of the club members who were registered within a certain period.
5. Click on the circles labelled **'Sort by Last Name'** or **'Sort by Transaction Date/Time'** to set the sort order for the report.
6. When your settings are completed, select **'search'** to view the results. The transactions that fall within the selected settings will be displayed in a list.

Important: With a family membership, only the Head of Household will be visible in the transaction table. You can change the settings for your search and select 'search' again or you can export the results to an excel file by selecting 'Export to Excel'.

7. **Select 'Open'** to view the excel document or alternatively 'Save' if you wish to save the document to your computer.
8. **Select 'Open'** to view the document.

You now have successfully created a list of all the transactions for the current membership year.