# Viewing Transactions Associated with a Line Item
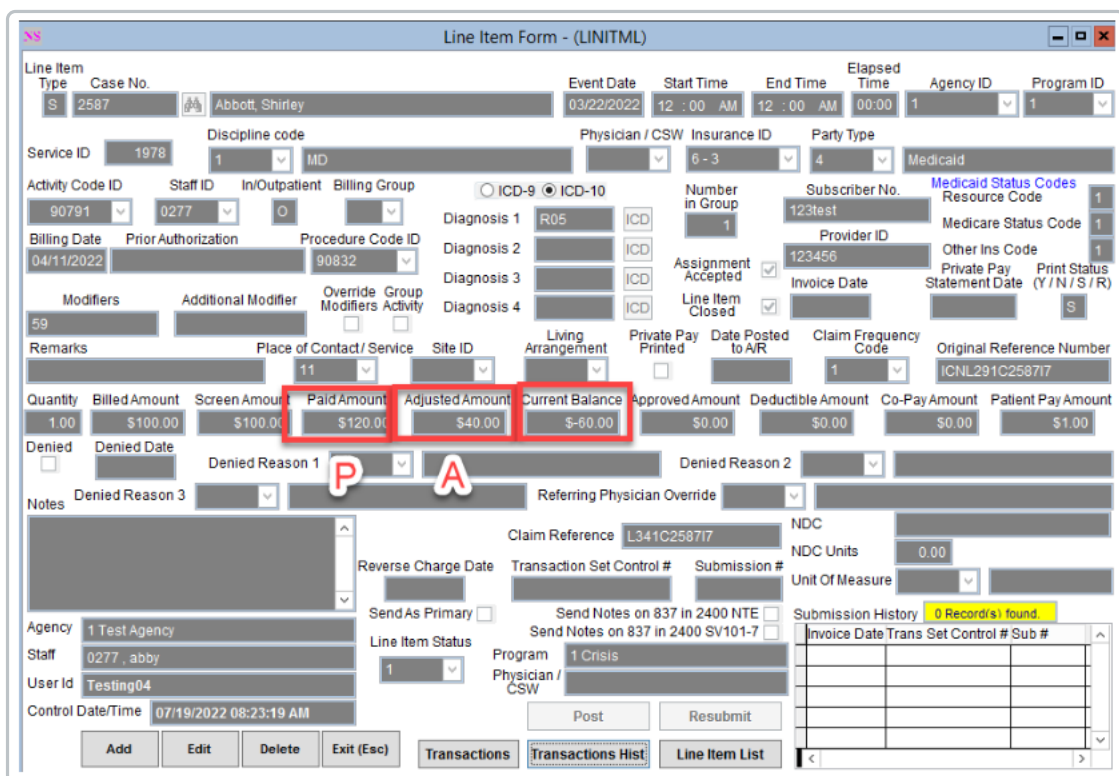
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## What are Transactions?

Transactions in the Billing Engine are payments or adjustments posted to Line Items.

When transactions are posted to Line Items, the balance on the Line Item will change:

- The **Paid Amount** field will show the sum of the Payment Transactions **(P)** associated with the Line Item.
- The **Adjusted Amount** field will show the sum of the Adjustment Transactions **(A)** associated with the Line Item.
- The **Current Balance** field will show the total of the Charge Amount minus the Paid Amount (P) minus the Adjusted Amount (A).



## Viewing Transactions Associated with a Line Item from the Transaction Form

There are three ways you can access the Transaction form:

- Billing Menu
- Line Items List
- Line Items Form

## From the Billing Menu

If a user is looking for only transaction information and not line item information, they can open the Transaction List from the Billing Menu.

1. Within the Billing Engine, navigate to **File** > **Billing** > **Transactions**.
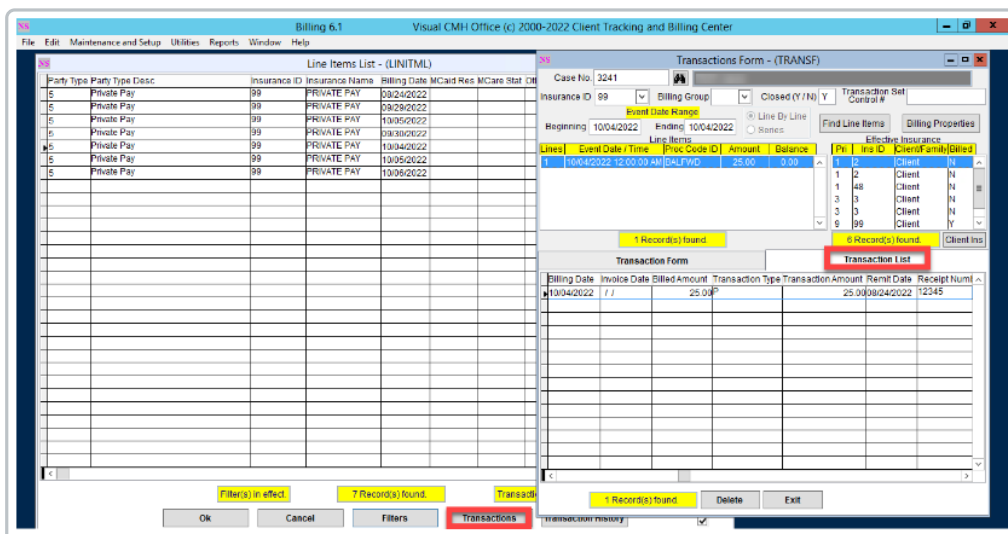
2. Enter a **Case No.**, or click the **Search** button 🔍 to search for the client.
3. Click the **Find Line Items** button.
4. Select a **Line Item** from the Line Items grid.
5. Click the **Transaction List** tab to view the transactions.
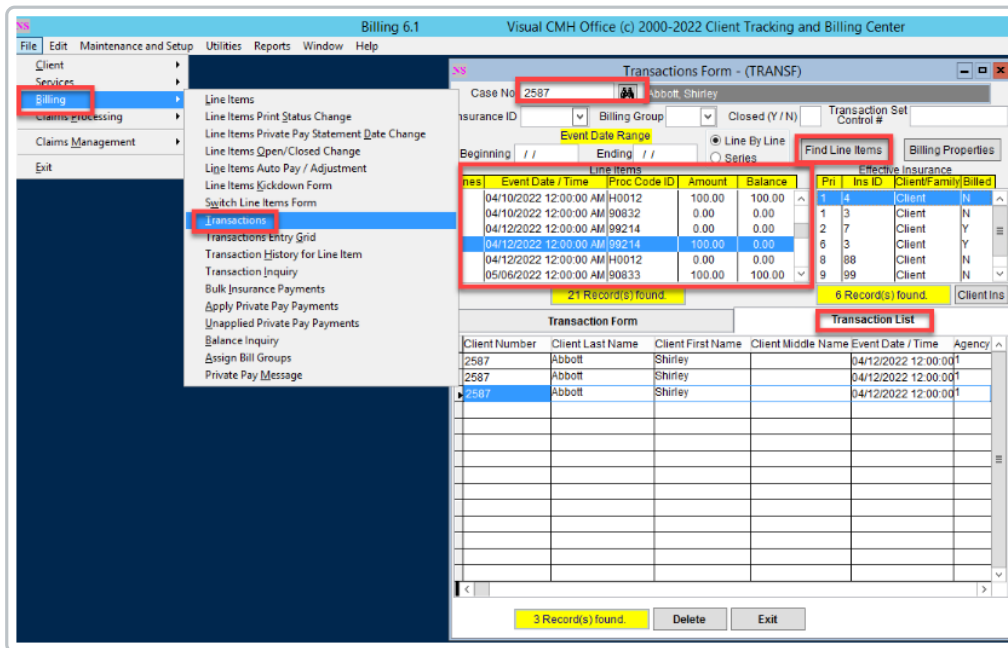


## From the Line Item List

If a user is looking at all of the Line Items for a client, and they want to see all of the transactions associated with the line item in the list:

1. Navigate to the **Line Items List** and enter the appropriate **filters** to populate the Line Item grid.
2. Select a **Line Item** from the grid.
3. Click **Transactions**.
4. The Transactions Form will open. Click the **Transaction List** tab to view the transactions.



## From the Line Item Form



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If a user opened a Line Item to get more details, and then wanted to view the transactions associated with that Line Item:
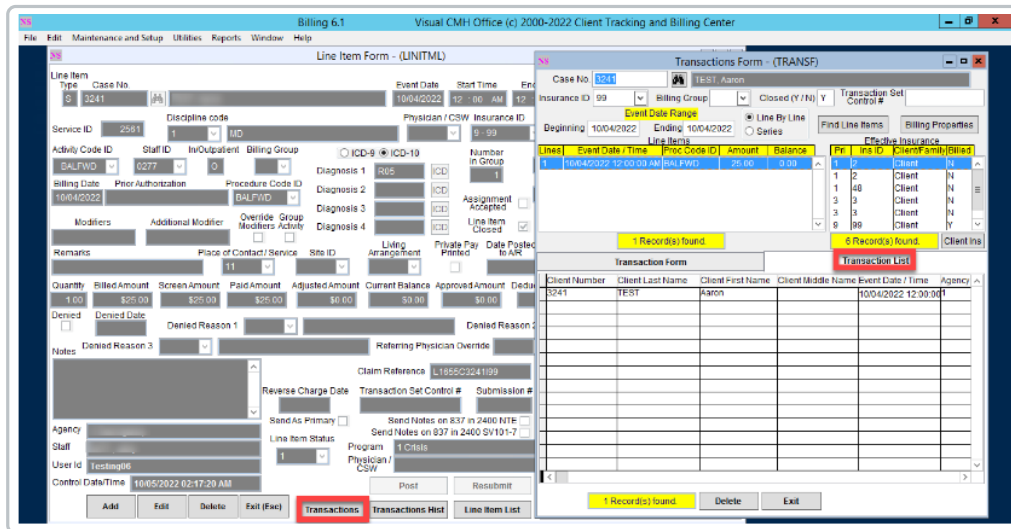
1. Navigate to the **Line Items List** and enter the appropriate **filters** to populate the Line Item grid.
2. Select a **Line Item** from the grid.
3. Click **Ok** to open the Line Item Form.
4. Click **Transactions**.
5. The Transactions Form will open. Click the **Transaction List** tab to view the transactions.



## Viewing Transactions Associated with a Line Item from the Services Form

Users can also view the transactions associated with a particular Line Item from within the Services Form.

1. Navigate to the **Services** form and enter the appropriate **filters** to populate the Services grid.
2. Select a **Service** from the grid.
3. Click the **Line Items/Trans** button.
4. The Line Items and Transactions List window will open. The top of this form contains a list of the Line Items that are associated with this service. Select a **Line Item** from this list.
5. The transactions associated with the selected Line Item will appear in the bottom of the window, in the Transactions grid.
6. When finished, click **OK**.