# Transaction History

Last Modified on 03/14/2023 3:57 pm ED

Office Practicum

## About

The **Transaction History** form shows the *history of transaction changes for specific Line Items* Billing Engine users are able to view the transaction history of a Line Item from the **Line Item List** or the **Line Item Form**.

**Disclaimer**: The **Transaction History** form does NOT refer to or show the history of transactions relating to specific clients. To view a client's previous transactions, please see the View Transactions article.

#### **Record Status Meanings**

<b>Record Status</b>	Meaning	Definition
I	Insert	This is a record of the transaction being applied to the Line Item.
U	Update	This is a record of the transaction being updated. <b>Note</b> : Sometimes an updated record is generated upon the insert of the record. So, you may see an Insert record followed by an Update record.
D	Deleted	This is a record of the transaction being deleted.

#### View Transaction History from the Line Item List

- 1. Navigate to the Line Items List and enter the appropriate filters to populate the Line Item grid.
- 2. Select the Line Item you want to view the Transaction History of.
- 3. Click the Transaction History button.
- 4. The Transaction History grid will open. You will be able to see the status of each transaction associated with the Line Item.





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### View Transaction History from the Line Item Form

- 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  ${\bf Ok}$  to open the Line Item Form.
- $\label{eq:click} \textbf{4. Click the Transaction History} \text{ button}.$
- 5. The Transaction History grid will open. You will be able to see the status of each transaction associated with the Line Item.





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Note: If the Transaction History button is inactive in the Line Item Form it means there are no active transactions associated with the Line Item. To view Transaction History for a line item with no active transaction associated please navigate to the **Transaction History** grid from the **Line Item List**.

