Searching for Transactions

When a transaction has been created in CUFS, there may be a need to search for that transaction at a later time. There are two ways of searching for transactions and these can be used by users with any AR responsibility.

Option 1 – Finding Transactions

To search for a transaction carry out the following steps:

1. Double click on Transaction from the Navigator screen.
2. Double click on Transactions again from the sub categories of Transactions. This will take you the Invoice header screen.
3. Click on the ‘torch’ icon in the top tool bar as shown above. This will now open a new dialogue box called Find Transactions.
4. To search by transaction number enter the transaction number into the **Transaction Number** field and then press tab. Otherwise you can use any of the other fields available to assist you in your search. Upon populating all the relevant fields click on ‘Find’.

5. Your transaction will now display if you searched on the transaction number. However if you used other search criteria, you may be presented with a range of invoices and this will appear in the **Transactions Summary** screen. You can review each transaction by clicking into the line and then clicking on the ‘Open’ button.

6. You will now have the invoice header screen displayed.
Option 2 – F11 function using a PC

To search for the transaction, carry out the following steps:

1. Double click on **Transaction** from the Navigator screen.
2. Double click on **Transactions** again from the sub categories of Transactions. This will take you the Invoice header screen.
3. Press the **F11** key. This will turn the invoice header screen in to query mode (light blue screen colour).
4. Enter the transaction number into the **Number** field (indicated above).
5. Hold the **CTRL** key and press the **F11** key and to search for your transaction number.
6. This will now pull through the transaction number in question.