

## How to Use Transaction History

**When to use:** When you wish to review the Buy, Transfer and Recycle history.

- 1) Click on the **CLIENTS** tab, and select “**Manage Client**”
- 2) Locate and click the name of your organization or sub-client in the **CLIENT TREE**
- 3) In the **PRODUCT POOLS** section, click “**Add/Edit**”

You are now on the Manage Pools screen

- 4) Locate the box with the Product you wish to view
- 5) Click “**Transaction History**” in that box.

You are now on the Product Transaction History screen for that specific product.

Look in the **PURCHASE HISTORY** section to view details on purchases that increased the selected pool.

Look in the **TRANSFER IN HISTORY** section to view details on quantities that were transferred in that increased the selected pool.

Look in the **TRANSFER OUT HISTORY** section to view details on quantities that were transferred out which decreased the selected pool

- 1) Additional details may be viewed by clicking the underlined Transfer Date:

Look in the **RECYCLE HISTORY** section to view details on quantities that were recycled and increased the product pool.

- 1) Additional details may be viewed by clicking the underlined Recycle Date: