

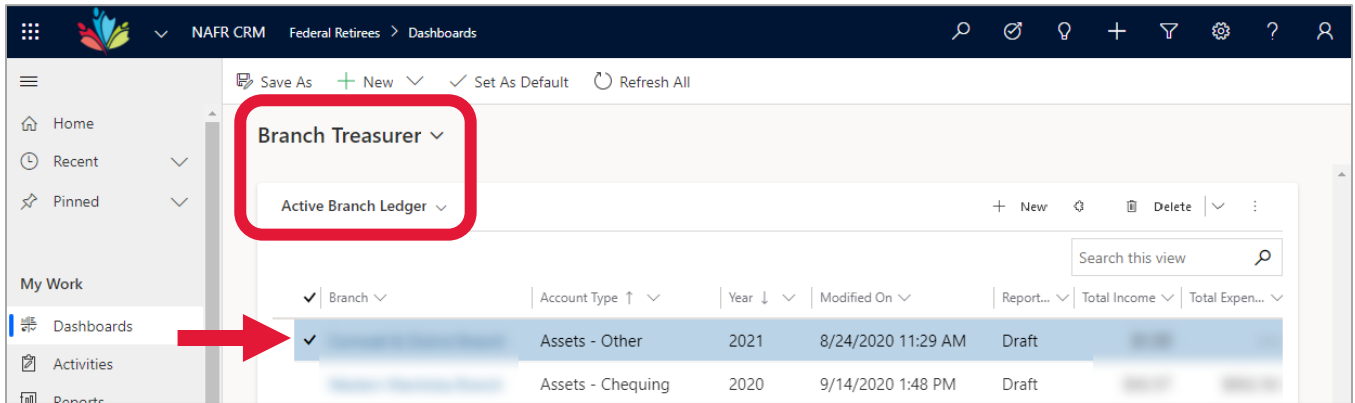


CRM Transaction Entry Quick Reference

Step 1: Select the ledger

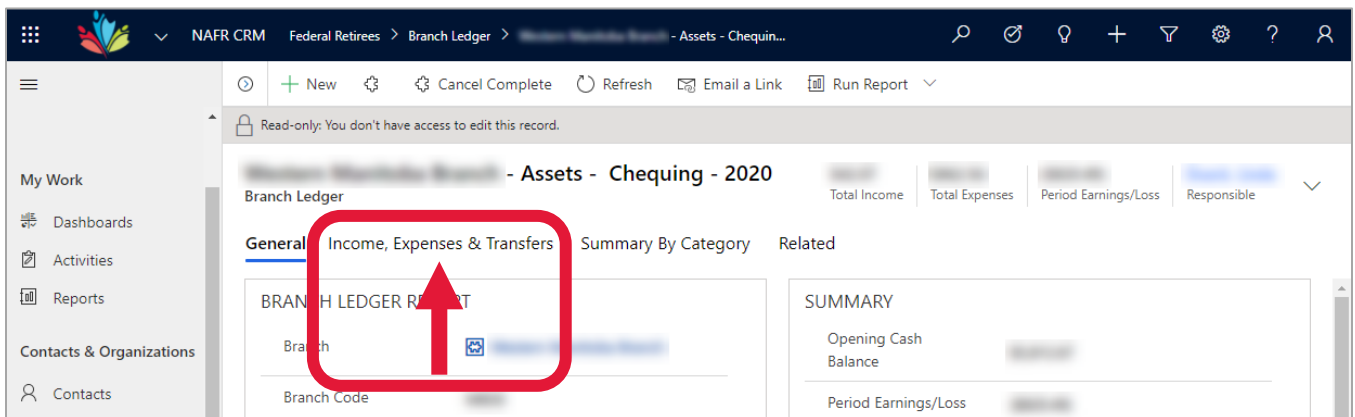
Select the ledger you wish to work in from the **Active Branch Ledger** list from the Treasurer's dashboard or using the left menu under **Branch Ledger** by double clicking anywhere on the line except on the branch name.

In most cases, you will be working in the **Assets- Chequing** or the **Assets- Other** (for the fees entry).



Step 2: Select the tab

Select the **Income, Expenses & Transfers** tab which appears just below the ledger name to go to the transactions page.

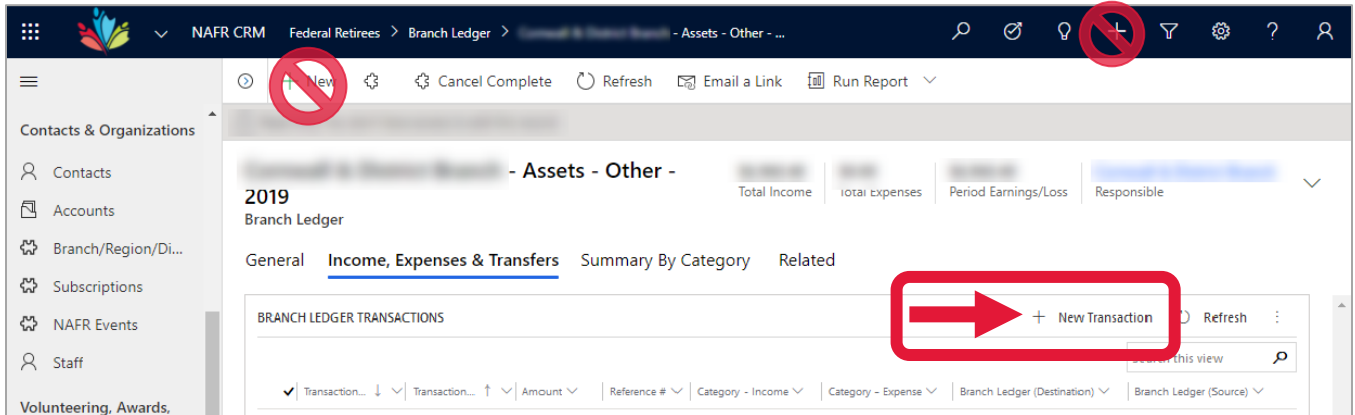




CRM Transaction Entry Quick Reference

Step 3: Select the button

Select **+ New Transaction** button shown below and to the right of the **Branch Ledger Transactions** title line.



Step 4: The Quick Create screen

The familiar **Quick Create: Transaction** screen will appear down the right-hand side.

Fill in the blanks as required. Remember to be consistent in the formats for **Payor/Payee & Explanation** and **Ref #**. Always keep the **Category Definitions** close at hand for easy reference and to ensure the correct grouping is used.

