

## Reporting a Single Transaction

Jennifer M - 2023-12-21 - Reporting

There are two ways to access the single transaction reporting form.

- Click on the link from the homepage (Connect Plus, Platinum and Prospect Hunter subscribers)



- Click on **My Reports** from the main toolbar and select Report a Single Transaction from the dropdown.



On the Report a Single Transaction page, you must enter can the distributor company name and it is recommended that you enter as much additional information as possible. After entering the customer information, it is important to enter the transaction details.

Your Customer's Information			Transaction Detail
Company Name*		ASI #	Invoice #
<input type="text" value="Enter Company Name"/>		<input type="text" value="Enter ASI #"/>	<input type="text" value="Enter Invoice #"/>
Contact Name	Phone #	Fax #	Invoice Date*
<input type="text" value="Enter Contact Name"/>	<input type="text" value="(###) ###-####"/>	<input type="text" value="(###) ###-####"/>	<input type="text" value="Select Date"/>
E-mail	Address 1	Address 2	Payment Due Date*
<input type="text" value="Enter E-mail"/>	<input type="text" value="Enter Address"/>	<input type="text" value="Enter Address"/>	<input type="text" value="Select Date"/>
City	State / Province	Zip / Postal Code	Invoice Amount*
<input type="text" value="Enter City"/>	<input type="text" value="State/Province"/>	<input type="text" value="Enter Zip / Postal Code"/>	<input type="text" value="Enter Amount"/>

In the bottom half of the screen, click on the tab for the type of transaction and then enter as much information as possible.

Click the Submit button when you are finished.

What Type of Transaction would you like to report on?

Paid	Collections Information	Non-Sufficient Funds	Bankruptcy / Merger
------	-------------------------	----------------------	---------------------

I'm reporting this company is making a payment .

Date Paid*	Amount Paid*
<div>Select Date Paid<div></div></div>	<div>Enter Amount</div>

Extended Credit Amount

Enter Amount

Reset	Submit	* Required Field
-------	--------	------------------

If you need to start over, you can click on the Reset button.