

# Quick Guide to Viewing Transactions on Batch



Batch users can view invoices in their Batch web portal through one of three access points: Summary Screens (Current and Future), Advanced Search, and Quick Search. Below is the access point/s you choose based on the transaction/s you're trying to find. Refer to page two for status and access point definitions.



Invoices to Find	Access Point*	Location in Batch
Outstanding invoices due this month	Current Summary	Batch portal home screen; Period Summaries drop down menu
Outstanding credits	Current Summary	Batch portal home screen; Period Summaries drop down menu
Recent outstanding invoices ( <i>due after the end of the current month</i> )	Future Summary	Period Summaries dropdown menu
All outstanding invoices and credits	Advanced Search	Advanced Search link in yellow menu bar
Invoices/credits paid through Batch	Past Payments	Period Summaries dropdown menu
Invoices/credits paid directly to publisher	Advanced Search (set status to <i>Not Paid in Batch</i> )	Advanced Search link in yellow menu bar
Any individual invoice or credit	Quick Search	Search box in yellow menu bar
Invoices by ISBN	Quick Search	Search box in yellow menu bar

*\*Advanced Search can be used as an access point for all groups of transactions and individual transactions.*

## Access Point Notes

**Current or Future Summary** can only be used to view outstanding invoices. To view transactions, users click on one of the numbers within the summary table.

**Past Payments** will appear as an option under the Period Summaries menu after your first payment through Batch.

**Advanced Search** can be used for any search in place of the Summary Screens or the Quick Search box.

**Quick Search** will only return transactions from the previous three years. Users should use Advanced Search to find transactions older than three years.

## Status Notes

**Outstanding** refers to invoices that have yet to be paid and credits yet to be used. Any transaction that has a status of Open, Verified, or Authorized is considered Outstanding. Users are able to view invoices by specific status via the Summary Screens or Advanced Search. Only invoices and credits that have been Authorized can be remitted to the publisher.

**Cleared** refers to invoices or credits that have been remitted to the publisher by Batch and are not consider outstanding.

**Not Paid through Batch** refers to invoices or credits that have been marked by the store to indicate the store has paid the publisher directly. Transactions marked as Not Paid in Batch are no longer considered outstanding and will not be listed with a store's outstanding invoices.

*Please refer page 14 of the [Batch User Guide](#) for detailed information about Statuses*