Payments Report %

The Payments Report enables you to find specific transactions based on criteria you choose or can be used to view a list of all your transactions for a given period.

- 1. Go to E-Commerce > Reports in the main navigation menu
- 2. Click on Payments Report

Daily Payments This report shows all money that was collected (grouped by day).	
Payments Report This report shows all payments that were made.	
Net Income by Invoice This report shows total income minus commission (grouped by invoice).	

3. Enter basic search criteria such as the dates to filter your report by or a date interval to create a saved report for a rolling time period

Search Criteria			
Invoice Id			
Date	09-01-2020 9/17/2020		
Date Interval	Please select one 🗸 🗸		
Date Custom Interval	Please select one Today	days ago and/or	
Pay Amt	Last 7 Days		\$
	Last 90 Days		

4. Additional criteria can be entered in the Misc Criteria or Custom Fields tabs

Payments Report				
Search A	Address Misc Crite		Columns	
Lead Source	contains any	~		
	Type to search			
Tags	With ANY of these T	ags v		

5. Adjust what information will be provided in your report in the Columns tab

Search	Address	Misc Criteria	Custom Fields	Columns
istomize (Columns on	Search Results		
istom Colu	mns:		Available	Fields:
			🔺 Id	
Referral pa	artner	~ ~ ×	Payment	id
			Contact	id
Business s	state	~ ~ ×	Descript	ion
			Contact	
Sale		~ ~ ×	First nam	ie

6. Click Search

Invoice Id]	
Date	-		
Date Interval	Please select one)	
Date Custom Interval	180	days ago and/or	
Pay Amt	equals v 0.00		\$
Search Reset Fi	lters		

Note! For questions about how to use this feature, please contact our Support Team. To provide feeback on the accuracy of this article, use the form below.