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AR Transaction Entry

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Overview

A/R Transaction Entry allows users to create and edit A/R Transactions from the Customer Card. A/R Transaction Entry is located on the A/R tab on the customer card. You can use this module to create a Credit Memo, Debit Memo, Warranty, Finance Charge, Sale / Invoice, Service / Repair document, or Return. In this document, you will learn how to create, edit, and print a Customer A/R transaction. Any relevant securities and settings will be shown at the end of the document.

Usage

Navigate to the A/R tab on a customer card in SalesPad Desktop. Then, select the Transaction Entry tab located within the A/R tab.

Creating an A/R Transaction

A transaction can be created by clicking on the **New** button on the Transaction Entry tab. A dropdown will appear, allowing the user to select the type of A/R Transaction they wish to create. This list is populated using the *Allow Transaction Types* sub-security for the *Customer A/R Transaction Entry* security.

Editing Existing A/R Transactions

Users can edit existing A/R Transactions by clicking on the ellipsis (...) button located on the Transaction Num field. This will present the user with the A/R Transaction Search screen.

AR Transaction Search

Close Search

Search By

Transaction Number:

Customer Number:

Search Options

☐ Show Historical Transactions

☐ Show Open Transactions

☒ Show Work Transactions

☐ Show Void Transactions

Search Results

Customer Num	Transaction T...	Transaction Num...	Transaction Sta...	Transaction D...	Transaction Descrip...	Total	Sales Amount	Tax Amount	Misc Amount	Payment Terms	Tax Schedule	Batch Number	Void Status
AARONFIT0...	Sale / Invoice	SALES000000001...	Work	5/9/2017		53.50	50.00	3.50	0.00	Net 30	USASTCIT...	RM BATCH	0

Users can then search for a transaction by number, or by using the auto filter row. Once a transaction is selected, the A/R Transaction Entry window will then populate with information from the selected transaction.

Contact Addresses CRM Note A/R Item History Sales Documents Credit Cards User Fields Sales Graph Extended Pricing Quick Report Recurring Sales Default Doc Items Special Pricing Saved Attributes Contract Pricing Email

Overview Notes Transaction Entry

New Save Print Clear

Transaction Info

Transaction Type: Sale / Invoice

Transaction Num: SALES0000000010001

Batch Num: RM BATCH

Credit Card ID:

Checkbook ID:

Check Number:

PO Number:

Transaction Date: 5/9/2017

Description:

Amounts

Transaction Amount: 50.00

Cost: 0.00

Trade Discount: 0.00

Freight: 0.00

Misc Charge: 0.00

Tax: 3.50

Amount Detail

Cash Amount: 0.00

Check Amount: 0.00

Credit Card Amount: 0.00

Discount Amount: 0.00

Total: 53.50

On Account: 53.50

Customer Info

Customer Num: AARONFIT0001

Customer Name: Aaron Fitz Electrical

Currency ID: Z-US\$

Payment Terms: NET 30

Shipping Method: Local Delivery

Tax Schedule: State Tax-USA

Sales Rep: West, Paul

Address Code: PRIMARY

Sales Territory: Illinois and Missouri

Printing

Users can print A/R Transactions using the **Print** button located in the toolbar of the Transaction Entry tab. Clicking this button will present the user with the "Print Document" window. Here, users can select the report they wish to print. Reports can be created and edited in Report Manager. For more information about designing reports, refer to our [Reports](#) documentation.

Overview

Notes

Transaction Entry

New

Save

Print

Clear

Print Document

Print Options

Select All

Select None

☒ Collate

☐ Close after Print

☒ Print as Single Job

☒ Email as Single Job

☐ Prevent Changes

Properties...

Mark Default Reports

Print Attachments

Print None

Available Reports

<input checked="" type="checkbox"/>	Report Name	Printer	Copies	Send To R...
<input type="checkbox"/>	AR Transaction Report			<input type="checkbox"/>
<input type="checkbox"/>	Copy of AR Transaction Report			<input type="checkbox"/>

Fax...

Email...

Preview...

Print To...

Quick Print

Close

Security

*Customer A/R Transaction Entry** - Allows users to use the A/R transaction entry in the Customer card

Note: Securities with an asterisk (such as *Customer A/R Transaction Entry*) have sub-securities that are listed in the middle section of the Security field. Sub-security descriptions appear in the bottom section of the field. Review and customize these as desired.