ClubRunner

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How do I add transactions to the district Grants cash flow report?

Michael C. - 2021-03-22 - Grant Management Guides

The District Grants Cash Flow report can be used to track all actual transactions made by the District within their Grants account. This can include payments received by Rotary as well as payments made to any Clubs and any other District expenses.

- 1. Select the **Grants** tab from the menu bar near the top.
- 2. Select the **District Grants** link from the menu bar directly below.
- 3. Select the District Grants Cash Flow link from the menu on the left.

Grants Grants Dashboard	District Grants Cash Flow			
View All Grants Qualified Clubs Submit a Grant Request	This Cashflow statement represents all actual transactions completed by the			
Reports Financial Summary	District within its Grants Account, including payments received by RI, payments made to the clubs, and any District expenses related to Grants. Edit Help Text			
District Grants Cash Flow				
Documents	Print Return to Dashboard • Add a Transaction			
Settings & Customization	Deposit Withdrawal			
Edit Notifications	No data to display			
Message Templates Settings	Total: \$0.00 \$0.00 Balance: \$0.00			
Help				
Grants Module				

4. Select the Add a Transaction button.



- 5. Enter the transaction information such as:
 - Date
 - \circ Description
 - Amount
 - Payment Type
 - $\circ~$ Is this transaction is associated with a project
 - Project
- 6. Once done, click the **Create** button.

Details

Date:	Feb 21, 2019 🛗 *		
Description:	l,		
Amount:	0.00 *		
Payment Type:	 Withdrawal (payment) Deposit * 		
Is this transaction associated with a project?	🖲 Yes 🔘 No		
Project:	Select Project *		
		Cancel	Create