



BLOCKWORX

Helpsheet
Viewing Your Transactions - Web

FEB 2021



Introduction

Blockworx is a digital platform which provides a direct link with the Property Management companies you carry out work for.

The Blockworx Web Portal includes a transactions history section. When you use Blockworx to submit an invoice to a property management company you are linked with, it is awaiting their authorisation. Once authorised, it will appear in your transactions list until it is paid. Therefore, anything listed in the transactions relates to invoices you are due to receive payment for.

This Helpsheet will guide you through the process of accessing the transactions list in the Blockworx Web Portal and using the built-in search functionality.

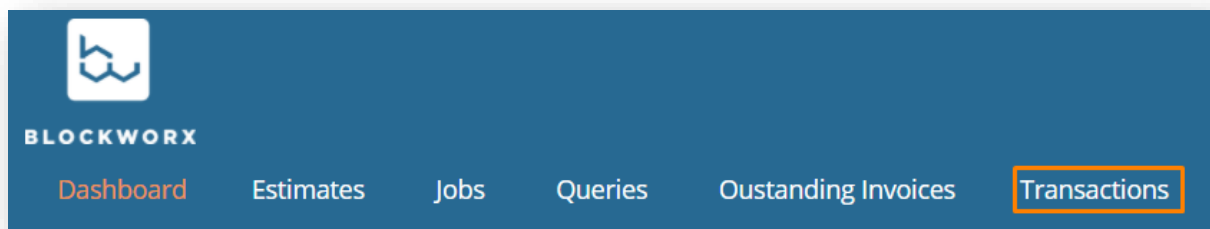
Currently, you can only access your transaction information on the Blockworx Web Portal.

Step 1 - Accessing the Blockworx Portal

- Click [here](#) to access the Blockworx Web Portal or type Blockworx.co.uk into the address bar of your web browser.
- This will take you to the main Blockworx screen where you can sign in.

Step 2 - Accessing your Transactions List

- Click on the **Transactions** tab in your Blockworx header bar at the top of the screen.



- This will open the **Transactions** screen.

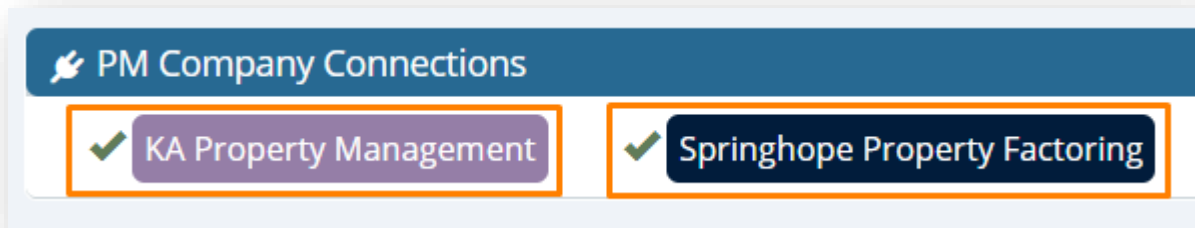


- The transactions list can act as an audit trail for all invoices you have submitted which have already been approved for payment by the property management companies you are linked with.

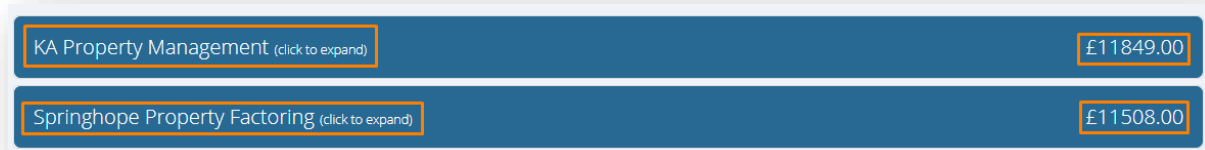


Step 3 – Understanding the Transactions List

- At the top of the screen, you will see the names of the property management companies you are linked with on Blockworx.



- Beneath this, there are headers for each property management company listing totals for invoices for which you are due to receive payment.



- Clicking on the name of a property management company will expand this header into the detail listing each individual invoice.

KA Property Management (click to expand) £11849.00

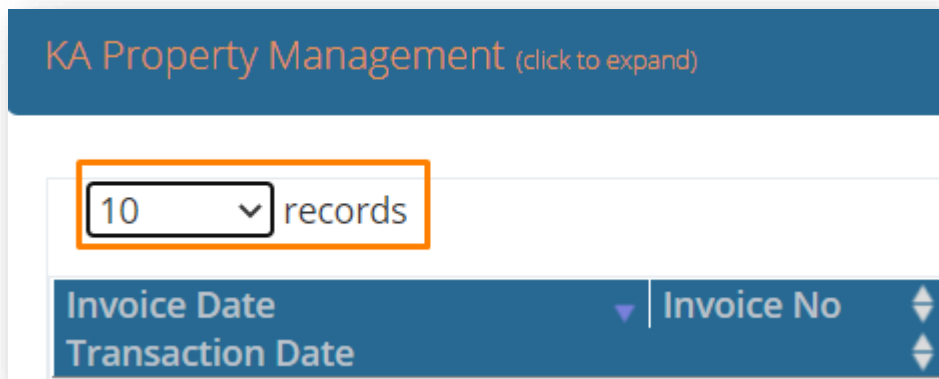
10 records Search:

Invoice Date Transaction Date	Invoice No	Goods Amount Total Amount	VAT Amount	Outstanding Amount Description	Running Balance
01/05/2021	Grounds Maintenance03022021	£111.00	£0.00	£111.00	£8599.00
03/02/2021		£111.00		Grounds Maintenance	
01/05/2021	Phoenix Crescent Grounds Maintenance03022021	£111.00	£0.00	£111.00	£8488.00
03/02/2021		£111.00		Grounds Maintenance for Phoenix Crescent	
01/05/2021	The Crescents Communal Grounds03022021	£600.00	£120.00	£720.00	£8377.00
03/02/2021		£720.00		The Crescents Communal Grounds	

- You can view the following for each transaction in the list:
 - Invoice Date
 - Transaction Date
 - Invoice Number
 - Goods Amount
 - Total Amount
 - VAT Amount
 - Invoice Description



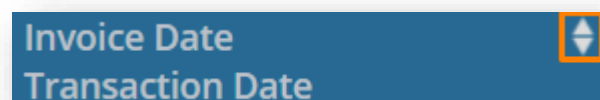
- Outstanding Amount
- Running Balance
- You can choose how many records you would like to view on a screen at the one time by choosing from the **Records** field in the top-left of the screen.



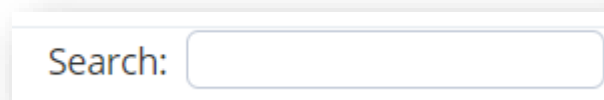
- At the bottom of the screen the **Page** field will let you know how many pages of transactions there are for an individual property management company.



- You can click on each of the available column headers to order the transaction list as per your requirements.



- There is also a **Search** field to enable you to search for an individual transaction.



- Enter text into the field and press enter on your keyboard.



- As the property management companies you are linked with process payments for these outstanding invoices, they will no longer be listed on this screen.

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