Transaction List

Module Guide: Transaction List (Transaction Type Setup)

Module Location

Project > Project Purchasing > Transaction List

Module Objective

The **Transaction List** module serves as the master data hub for creating and managing a list of **Transaction Types or Project Categories**. The categories defined here (such as "FA Procurement" or "Improvement and Modification") will be used to classify various projects or purchasing activities, thereby simplifying tracking and reporting processes.

1. Main View (Transaction Type List)

The main page of this module displays a list of all defined transaction types.

- **View**: This page displays all existing transaction types along with their status (active is marked with a green checkmark, inactive with a red cross).

2. Steps to Add a New Transaction Type

1. In the **Transaction Type** input box, type the name of the new category you want to add (for example, "Warehouse

Expansion Project").

2. Click the **[Add]** button.

3. The new category will immediately appear in the list below with an active status.

3. Managing Transaction Types

- **Modify**: You can change the name of an existing transaction type by clicking the edit icon (pencil) in the **Action** column.

- **Change Status**: You can activate or deactivate a category by clicking the green checkmark or red cross icon in the **Status** column.

Tips & Important Notes

- This is an important master data setup module and should be filled in before the other project purchasing transaction modules can be used effectively.

- The categories you create here will most likely become the options in a dropdown when you create a **Project Budget (RAB)** or a **Purchase Requisition** related to a project.

Revision #1
Created 16 October 2025 14:06:11 by Muhammad Ali Akbar
Updated 16 October 2025 14:07:17 by Muhammad Ali Akbar