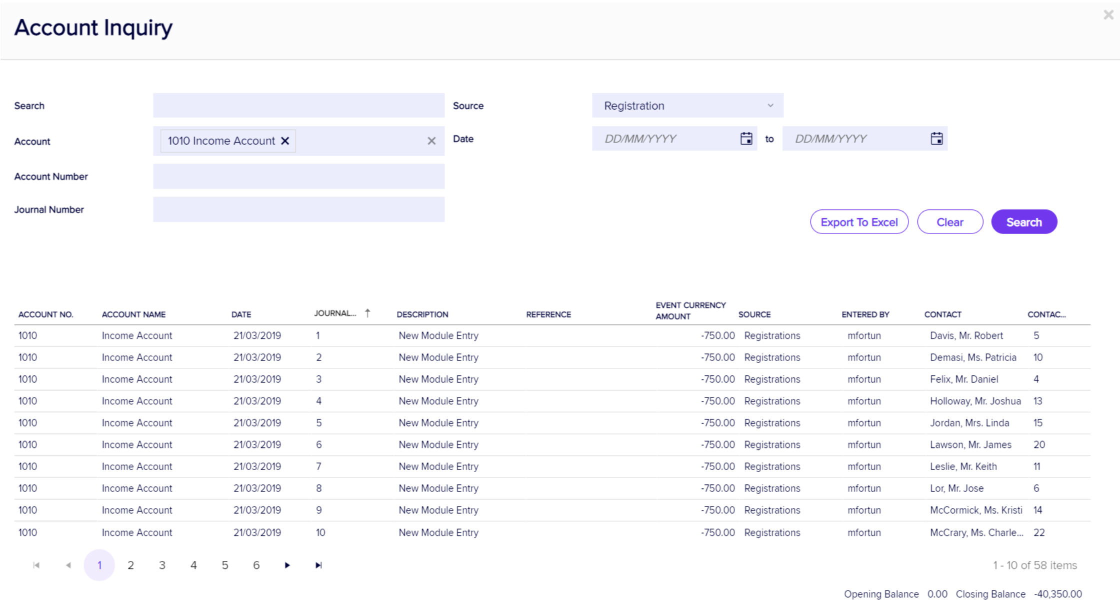
Account Inquiry

Last Modified on 11/29/2022 7:25 pm EST

Making an Account Inquiry is a common task for meeting managers. In EventsAir, you simply access Account Inquiry from the Accounting Panel.



To make an Account Inquiry, you can enter search data in any of these fields:

- **Search** - enter a search phrase here.
- **Account** - select an Account from the drop-down list, and your search will show all transactions within that account.
- **Account Number** - if you know the account number, simply enter it here to search.
- **Job Code** - if you use Job Codes, you can enter the job code here.
- **Journal Number** - if you know the journal number, simply enter it here to search.
- **Source** - you can select any module in EventsAir, and all transactions associated with that module will display.
- **Date** - you can specify a date range to display all transactions for that range.

Tip: Clicking on any column header will sort the results by that column.

Export Option

Clicking on **Export to Excel** will let you export the results of your search to Excel (.xlsx) format.

Tip: If you need to regularly export all transactions to an external accounting system, use the Export Manager instead. The Export Manager will flag exported transactions, so it will not export them twice. Consider the Account Inquiry most useful for ad hoc queries about transactions (to produce valuable tracking information for supervisors), while the Export Manager is for exporting transactions to your external accounting system, and making sure the same transactions are not exported twice. You would **not** take an ad hoc export from the Account Inquiry and import it into your external accounting system.