



## Recall a Transaction

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The recall feature in CenterPoint can be used to save data entry time in any transaction entry screen. If the Recall button is used, all details from the last transaction for that name (customer, vendor, etc.) are automatically filled into the new transaction including accounts, amounts, notations, etc. Recall is especially useful for transactions that use the same amount and accounts as the original transaction. For example, if you pay the same amount to an internet provider each month and its normally charged to the same account number. Information in the new transaction can be modified after the Recall button has been used. Changes made to the new transaction have no effect on the transaction that was recalled.

 Note: You can select the way recalled transactions display by default on the Vendor Invoices (A/P), Payments, Receipts, and Customer Invoices (Basic) screens to either Recall by Company or Recall by Company and Bank from the Options button.

 Note: If a recalled transaction is used and the transaction has inactive accounts included, a warning will display that includes a list of the inactive accounts. You can choose whether to display the warning in the future in File > Preferences > Accounts > Inactive Accounts.

The recall functionality can be used by manually selecting the Recall button in a transaction entry screen or an individual name can be set to automatically Recall the Last Transaction for this Name in a specific transaction entry screen.

[Manually Using the Recall Button in Transaction Entry](#)

[Setting Up a Name to Automatically Recall Last Transaction in a Specific Transaction Entry Screen](#)

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## Manually Using the Recall Button in Transaction Entry:

1. On any transaction entry screen, enter the **Company/Fund, Current Batch, Bank Account, and Name**.
2. At the bottom of the screen, click **Recall** to display the most current transaction entered for this name. Click **Recall** again to display the next most current, etc.

 Note: When you click Recall, transactions are displayed in reverse chronological order.

3. The current date is assigned and if applicable, the check number (if applicable) is incremented based on its numbering sequence. Make any needed modifications to the transaction and click **Save**.

## Setting Up a Name to Automatically Recall Last Transaction in a Specific Transaction Entry Screen

1. On the transaction entry screen where you would like the system to automatically recall the previous transaction for this name, enter the **Company, Batch, Bank Account, and Name** (customer, vendor, etc.).
2. At the bottom of the screen, click **Recall** to display the most current transaction entered for this name.
3. The current date is assigned and if applicable, the check number is incremented based on its numbering sequence. Make any needed modifications to the transaction.

4. Right-click on the selected **Name** (customer, vendor, etc.) and select **Transaction Actions > Recall Last Transaction** and click **Save**.
5. For each subsequent transaction entered in this screen for this name will automatically recall the previous entry.