

Accounting Dashboard

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The Accounting Dashboard is the first stop in your Farmbrite Accounting journey. You can view and update all of your previously entered transactions here, and create new ones to record income and expenses. These transactions are also searchable, filterable, and sortable, giving you the opportunity to find exactly the records you're looking for. Wondering what you paid to your old feed supplier compared to your new one, or how much your total harvesting expenses were last year? Just search by keyword or filter by category and easily find your individual transactions and totals. The Dashboard also presents a handy graph that displays a comparison of income and expenses, and a chart to break down your expenses by category.

Working with Transactions

If you don't have any transactions entered in your Farmbrite Accounting system yet, you'll need to add them before you can see data on this page. You can follow the instructions in [this help article](#) to get started. Once you have transactions, you'll see them displayed in the grid on the lower portion of your Dashboard.

You can work with these transactions in four ways. Watch this quick video below for examples, and then read more about each feature below.

The screenshot shows the Farmbrite Accounting Dashboard interface. At the top, there is a search bar and navigation links for 'Quick Add', 'Account', 'Chris', and 'Help'. Below the search bar, there are buttons for 'Record a Transaction' and 'Search Transactions'. A summary bar displays 'Date: this_year', 'Revenue: \$13,840', 'Expenses: \$4,851', and 'Profit: \$8,989'. The main area is a table of transactions with columns for Date, Payee, Category, Description, Type, and Amount. The table lists various transactions from January to March 2022, including expenses for fertilizers, seeds, and repairs.

Date	Payee	Category	Description	Type	Amount
Jan. 12, 2022	Advanced Nutrients	Fertilizers and lime	Nutrients for the first part of the year	Expense	-\$368.00
Feb. 15, 2022	Smiths Feed and Seed	Seeds and plants	Starting seed purchase 2022	Expense	-\$752.00
Mar. 01, 2022	Terrific Tilling Services	Custom hire (machine work)	Northwest Field A prep work for 2022 season	Expense	-\$539.66
Mar. 09, 2022	AgriCulture Fertilizer LLC	Fertilizers and lime	Various Nutrients for Northwest Field A - NitroGen Xtreme, Big Bloom, GroZilla XXL	Expense	-\$327.65
Mar. 16, 2022	Randy Marshall	Repairs and maintenance	John Deere 1025R Tractor Fuel filter	Expense	-\$27.99
Mar. 16, 2022	Randy Marshall	Repairs and maintenance	John Deere 1025R Tractor Brake fluid	Expense	-\$48.00
Mar. 16, 2022	Randy Marshall	Repairs and maintenance	John Deere 1025R Tractor Tires	Expense	-\$800.00
Mar. 17, 2022	Norton Nurseries	Seeds and plants	Seeds for 2022 CSA Crops in Northwest Field A	Expense	-\$468.22
Mar. 21, 2022	Steve's Service	Repairs and maintenance	Tune up on the John Deere	Expense	-\$280.00
Mar. 31, 2022	Bobo's Feed and Seed	Feed	Food for our new brood of chicks	Expense	-\$65.00
Apr. 05, 2022	Mayer's Manure Corp	Fertilizers and lime	Manure from Mayer's for Northwest	Expense	-\$300.00

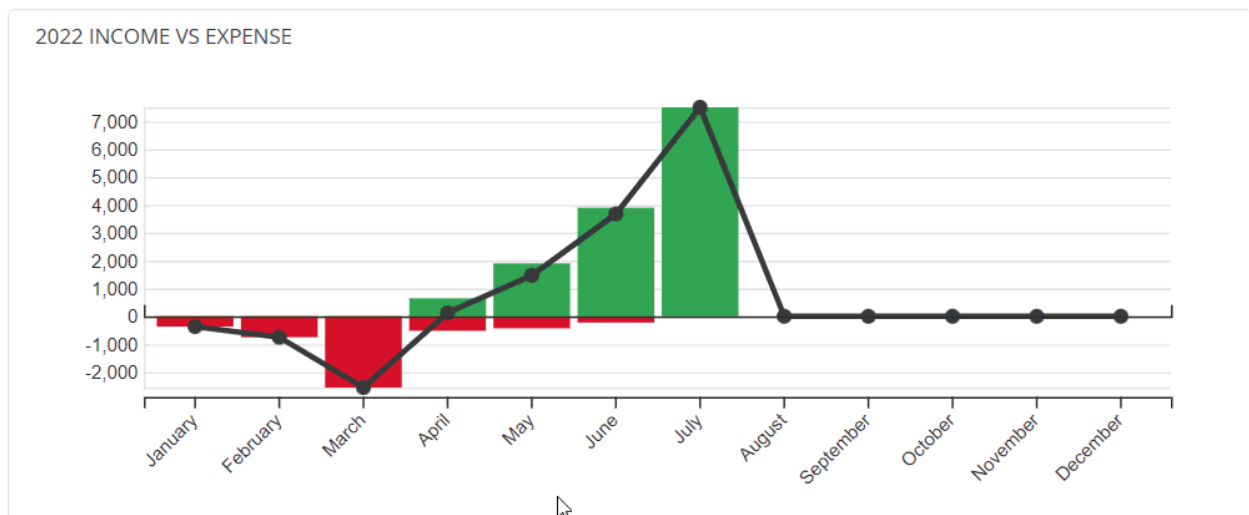
1. **Search** - Use the search box on the right to look for keywords, payee/customer, or check number. This is helpful if you are looking for more information about a specific transaction.
2. **Filter** - If you're looking to find multiple transactions that meet your criteria, you can filter rather than search. Click the filter button below the search bar, and you will see options expand to refine your results. You can use a combination of them to get more granular. For example, you could filter by keyword, type, and date to find just CSA share income for a specific month.
 - o Type - Are you looking for income or expense transactions?
 - o Payee/Customer - Who did you pay, or who paid you?

- Keywords - Show transactions that you've tagged with specific keywords or phrases.
 - Date - Display transactions that occurred within a specific date range.
 - Reporting Year - View transactions that you associated with a specific reporting year.
 - Category - Look at transactions associated with a certain accounting category.
3. **Sort** - Click on any of the column headers to sort the grid by the information in the column. For example, you might sort by date to get a chronological list of transactions. Click the date column again to reverse the order and see your newest transactions first. You can do the same with amount, category, or any column you find useful.
 4. **Update** - Use the "3 Dots" actions menu on the right of any transaction to make edits. This can also be accomplished by clicking on the transaction row itself. A window will open for you to update and edit existing information about the transaction. You can also delete the transactions from the action menu. **Be careful though - deleting a transaction is permanent, and the transactions cannot be restored once deleted.**

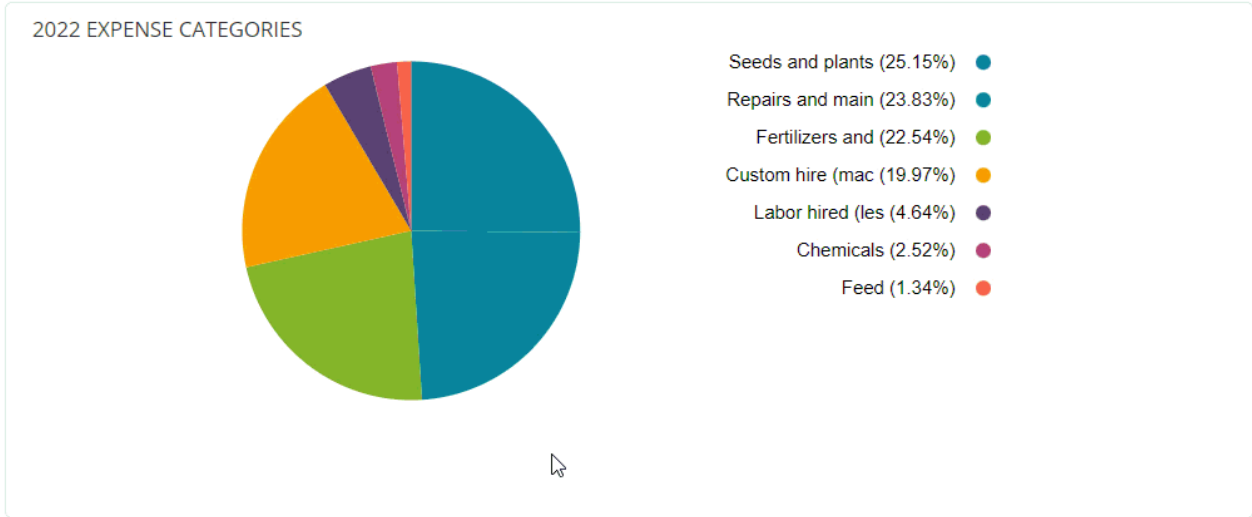
Charts and Graphs

If you prefer a visual representation of your finances, the chart and graph at the top of the page provide an easy to interpret summary of your transactions.

On the left, you'll find an Income Versus Expense Comparison. This bar graph plots each month of this calendar year, showing your total income in green and expenses in red. In the example below, we're investing in our crops during the winter months, but then seeing the return in spring and summer when we start selling CSA shares and open our booth at the farmer's market. You can hover over the graph to see the numbers that make up each month's income, expenses, and total.



On the right, you'll see a pie chart showing expense categories. This displays the percentage of overall expenses assigned to each category. Hover over each slice to see more information - the category and the total. The right side also displays each category with the percentage as well, with the highest percentage at the top of the list.



Exporting Transactions

You can also download these transactions into a spreadsheet if you'd like to work with them outside of Farmbrite. Maybe you need to import them into a different system, or just want to run some formulas to find different totals. Scroll to the bottom of the page and click Download Transactions to get the spreadsheet. The file will be added to your default downloads folder, and usually displays in the bottom left of your browser. Note that only the transactions displayed will be included in the spreadsheet, as the filters and search you apply will also be included when downloading the transactions.

Quick Add ▾
Account ▾
Chris ▾
Help

	Date	Vendor	Category	Description	Type	Amount	
			raised				
	Apr. 13, 2022	Pete's Pesticides	Chemicals	Purchased first application of pesticides for 2022 Season	Expense	-\$122.47	⋮
	Apr. 05, 2022	Mayer Manure Corp	Fertilizers and lime	Manure from Mayer's for Northwest Field A	Expense	-\$398.00	⋮
	Mar. 31, 2022	Bobo's Feed and Seed	Feed	Food for our new brood of chicks	Expense	-\$65.00	⋮
	Mar. 21, 2022	Steve's Service	Repairs and maintenance	Tune up on the John Deere	Expense	-\$280.00	⋮
	Mar. 17, 2022	Norton Nurseries	Seeds and plants	Seeds for 2022 CSA Crops in Northwest Field A	Expense	-\$468.22	⋮
	Mar. 16, 2022	Randy Marshall	Repairs and maintenance	John Deere 1025R Tractor Fuel filter	Expense	-\$27.99	⋮
	Mar. 16, 2022	Randy Marshall	Repairs and maintenance	John Deere 1025R Tractor Brake fluid	Expense	-\$48.00	⋮
	Mar. 16, 2022	Randy Marshall	Repairs and maintenance	John Deere 1025R Tractor Tires	Expense	-\$800.00	⋮
	Mar. 09, 2022	AgriCulture Fertilizer LLC	Fertilizers and lime	Various Nutrients for Northwest Field A - NitroGen Xtreme, Big Bloom, GroZilla XXL	Expense	-\$327.65	⋮
	Mar. 01, 2022	Terrific Tilling Services	Custom hire (machine work)	Northwest Field A prep work for 2022 season	Expense	-\$539.66	⋮
	Feb. 15, 2022	Smiths Feed and Seed	Seeds and plants	Starting seed purchase 2022	Expense	-\$752.00	⋮
	Jan. 12, 2022	Advanced Nutrients	Fertilizers and lime	Nutrients for the first part of the year	Expense	-\$368.00	⋮

Displaying all 20 Transactions

[Download Transactions](#)

Still have questions about your transactions? [Reach out to us!](#)