

Viewing reports.

Follow this guide to view reports in **Accounts**.

To perform this procedure, you require access to the **View and print transaction information** feature and to an **Office** and those **Groups / Accounts** included in the report.

1. From the **Accounts** menu, select **Reports** under the **View** heading.

A list of reports produced for the past 7 days are displayed.

Main menu

- Accounts
 - View
 - Accounts
 - Interact & charges
 - Groups
 - Reports**
 - Billing statements
 - Export
 - Accounts
 - Manage
 - Export schedules
 - Reports
 - Stop cheques
 - Authorise
 - Set preferences
 - Site map

View reports

To view a report PDF, click on its link. To request a report PDF not yet appearing here, use the Manage reports screen. Report PDFs are filtered according to the date they were generated or requested, the criteria selected below, and whether you have access to the accounts and groups they report on.

Select office, report type and dates

Office:

Report type: Generate:

Start date: 27 March 2025

End date: 2 April 2025

Report list Page 1 of 1

Description & details	Report type	Generate	Created
Daily transactions, (01 Apr 2025)	PDF 6 kb	Account transaction list	Daily
			2 Apr 2025 10:41

2. Complete any of the following:
 - Filter the list of reports by changing the **Office**, **Report type**, **Generate**, **State date** and **End date** and then selecting **Update list**.
 - Select the **Description & details** link to view the report in Adobe Portable Document format (PDF).
 - Use the Adobe Reader to **print** or **save** the report.