

Creating scheduled reports.

Follow this guide to create scheduled reports for assigned **Receipt services** through an **Office**.

To perform this procedure, you require access to the **View and print receipt information** feature and access to an **Office** and the **Receipt service** to be included in the report.

- From the left-hand menu, select **Receipts > Manage > Scheduled reports**.

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Manage scheduled reports

Create and manage scheduled reports. To view report details click the **Description** link. To view the report PDF's generated from these report schedules, use the **View - Scheduled reports** screen.

Select office and report

Office: Finance Department

Report: All

Schedule list Page 1 of 1

Description	Report	Service ID
<input type="radio"/> Daily receipt list report	Receipt list	All

Start of list Previous schedules Next schedules End of list

Delete Amend **Create**

- Choose an **Office** from the list and then select **Create**.

Enter schedule details

Office: Finance Department

Description:

Report: Receipt list

Service ID: All

Report retention period: 7 days

Choose sort order

Primary sort order: ☒ Ascending ☐ Descending By: Service ID

Secondary sort order: ☒ Ascending ☐ Descending By: Amount

Cancel Submit

- Complete the details as follows:
 - Enter a meaningful **Description** for the report.
 - Select a **Report** type from the list.
 - Select a corresponding **Service ID** from the list.
 - Select a **Report retention period** from the list.
 - Select the **order** in which items on the report are to be **sorted**.
 - Select **Submit** to save the report.

Corporate Online saves the details of the report. Corporate Online will produce the report each time a transaction is available for the chosen Service ID. The report will be available to view from **View > Scheduled reports**.