






Viewing and / or Scheduling a Transaction Activity Report

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SMART. SIMPLE. FAST.






Transaction Activity Report

1. Click **Menu** 
2. Click **REPORTS** 
3. Click **TRANSACTION ACTIVITY REPORT** 
4. Click **LOCATION (S)** 
ALL
SELECTED: 1 / 23
5. Select required **Locations**
6. Click **SEARCH BY** 
NONE
7. Select the field you wish to **Search By**
8. **Enter Search Criteria**

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Transaction Activity Report

9. Click **DATE TYPE** 
CREATE DATE
10. Select required **Date Type**
11. Click **DATE RANGE** 
LAST 7 DAYS
12. Select required **Date Range**
13. Click **ADVANCED SEARCH** for more search options
14. Select required **Transaction Type, Transaction Status, Other Party, Plant / Service Centre, Invoice Status, Equipment and Country**
15. Click 

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Scheduling a Report

1. Click **Menu** 
2. Click **REPORTS** 
3. Click **SCHEDULED REPORTS** 
4. Click **SCHEDULED REPORT** 
5. Select recurrence pattern - **Daily, Weekly, Monthly**
6. Select **End of Date of Report**
7. Amend **Report Title**
8. Click **NEXT** 

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Scheduling a Report

9. Select required **Locations, Source, Other Party, Plant / Service Centre, Date Type, Date Range, Transaction Type, Transaction Status, Equipment and Country**
10. Click **SAVE** 





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Disabling, Enabling, Editing and / or Removing a Scheduled Report








Disabling a Scheduled Report

1. Click **Menu** 
2. Click **REPORTS** 
3. Click **SCHEDULED REPORTS** 
4. Click **STATUS** 
5. Confirm that you want to **Turn Off** the report





Enabling a Scheduled Report

1. Click **Menu** 
2. Click **REPORTS** 
3. Click **SCHEDULED REPORTS** 
4. Click **STATUS** 

Editing a Scheduled Report

1. Click **Menu** 
2. Click **REPORTS** 
3. Click **SCHEDULED REPORTS** 
4. Click **VIEW / EDIT** 
5. Amend Scheduled Report by selecting **Recurrence**, **End Date of Report**, **Report Title** and **Report Parameters** as required
6. Click **SAVE** 

Removing a Scheduled Report

1. Click **Menu** 
2. Click **REPORTS** 
3. Click **SCHEDULED REPORTS** 
4. Click **X** 
5. Confirm that you want to **Delete** the report