Customer Portal - Reports / Documents

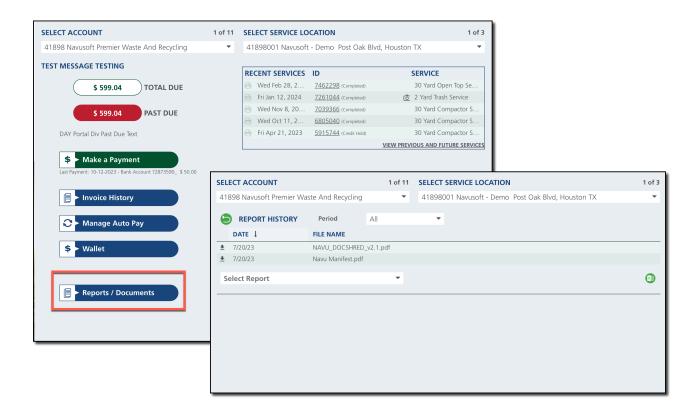
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Pathway: Customer Portal > Reports/Documents

The "Reports/Documents" button enables users to search for reports and documents associated with the selected account and service locations within a specified time frame. To enable accessibility to reports within the portal, both Account Class Setup 'Access to Reports' and Reports Setup 'Report Portal Access' must be set to yes.



Upon customer request, custom reports can be created to meet specific needs.



Report / Document Filter and Descriptions

Filter	Description
Select Account	Filter by the account the reports or documents are for.
Select Service Location	Filter by the service location the reports or documents are for.
Period	Filter by the month and year period of the document or report.
Select Report	Filter by the report or document type.

Report History

The Report History displays the previous reports that have been completed. To the left of the listed report there is an option to 'download' the report into a PDF.

