II. Reporting

THE REPORTING TAB



- Click the Reporting Tab to access the Document Report, Emails Received Report or custom reports.
- · These reports can help provide information on incoming documents/emails and aid in troubleshooting.

Documents Report

The Document Report shows all documents that you have received within a set period.

To run the report:

- 1. From the Report Selection field, select "Document Report".
- 2. Click the Calendar icons to define the period to report on.*
- 3. Click **Run Report**. The system runs the

report and then lists it on your screen.

- 4. At the top, you will be able to see the totals.
- 5. Click a row to open the Document Details page.
- 6. You can download the report in a csv or xlsx file by clicking on the download icon in the top right corner.

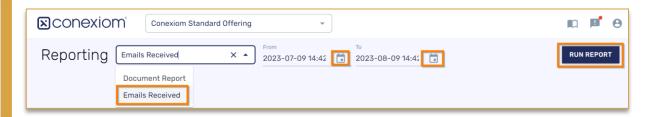
Use this report to track all documents received in the portal, as well the number of lines and total amounts (\$) that were processed.

Rconexiom m H A Reporting 2023-07-09 14:20 💼 2023-08-09 14:20 Document Report Document Report **Emails Received Document Count Lines Count** Total (\$) **Portals** Customers 1,479.86 Portal Received Company Document Processed Status Name Number On On On Name Conexiom 2023-06-2023-06-08 2023-06-Nuts 4 Wire Standard 200821788 Delivered 08 06:56 07:16 08 07:16 Offering

Emails Received Report

- The Emails Received Report shows all the emails that you have received within a set period.
- To run the report, select "Email Received" and follow the same instructions as the "Documents Report" above. (Note that this report does not have totals.)

Use this report to track who sent emails to the portal and when. You can also view which customer the document was routed to for troubleshooting.



* Conexiom reports run in the UTC time zone. Consider this when entering your dates and adjust accordingly.

