# 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.
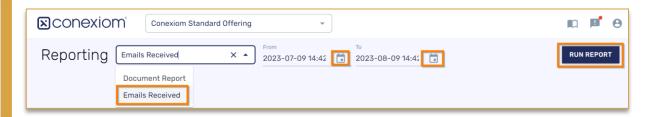6. You can download the report in a csv or xlsx file by clicking on the download icon in the top right corner.

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

## 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.