

Weekly Debt Movement Summary

Debtors>Reports>Report List

Shows a summary and detail movement of transactions between a specific date range.

Weekly Debt Movement Summary

Date From:

2023-05-11

-

Date To:

2023-05-18

+

Billing Group:

All

Sales Rep:

All

Include (Excluded Debtors):

☐

Excl. Branch Transactions:

☒

Show Division:

☐

Show Region:

☒

Show Posted By:

☐

Generate

Export

Close

Report Request

This is a report that shows a debtor’ summary of transactions movement

Date From / Date To	Choose the date range for which you want to view the report from / Select a date range of when you want to see up to on the report.
Billing Group	If you have set up billing groups you will be able to pull the report for a specific billing group
Sales Rep	If you want to run a report by a specific sales rep, then you will need to select the sales rep on the drop-down menu. If you leave the sales rep on all the report will run by all sales rep.
Include (Excluded Debtors)	It gives the user an option to include or exclude debtors on the report by ticking or not ticking the box

Show Division	Tick this box if you want to add a column to your report that shows the Divisions
Show Posted By	Tick this box if you want to add a column to your report that shows who processed the transaction
Excl. Branch Transactions	it gives the user an option to include or exclude branch transactions on the report by ticking the box
Show Region	Tick this box if you want to add a column to your report that shows the regions

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