

Report Request Button

Report request button allows you to schedule large reports to be run either in the evening or early morning and you can also share this with other users.

The output of the report is either in Excel and or PDF.

The screenshot shows a software window titled "GL Transaction Report (No1)". It contains two tabs: "Report" and "Footer Note". The "Report" tab is selected and displays the following fields and options:

- Account Group: All (dropdown)
- From Account: (empty dropdown)
- From Year: Year 7 (dropdown)
- From Period: 2026-04-01 (dropdown)
- Sort By: Code (dropdown)
- Division: (empty dropdown)
- Sheet Type: All (dropdown)
- To Account: (empty dropdown)
- To Period: 2026-04-30 (dropdown)
- Sub Sort By: Date (dropdown)
- Region: (empty dropdown)
- Trial Balance Format: ☒ (checkbox)
- Projects: ☐ (checkbox)
- Exclude Control Accs: ☐ (checkbox)
- With No Transactions: ☐ (checkbox)
- Include Footer Note: ☐ (checkbox)
- Summary Report: ☐ (checkbox)
- Show Customer Link: ☐ (checkbox)
- Show Division: ☐ (checkbox)
- Show CO Code: ☐ (checkbox)
- Show Region: ☐ (checkbox)

At the bottom of the window, there are three buttons: "Generate" (with a play icon), "Export" (with an Excel icon), and "Close" (with a red X icon). On the bottom right, outside the main dialog area, there is a "Report Request" button with a document icon, which is highlighted by a red rectangular box.

When clicking on the Report Request button this screen will appear

Report Request : GL Transaction Report (No1)

Report Request Setup

Report Description:

GL Transaction Report (No1)

Report Date:

2026-04-20

Report Category:

General Ledger

Report Time:

13:40

Report Owner:

Paige Granville

Include PDF:

☐

Landscape:

☐

Share:

Available

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#	Employee Name
1	Acck Support
2	
3	
4	Andrew Skene
5	
6	
7	
8	
9	
10	
11	Gerrit van Rooyen
12	

Selected

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#	Employee Name
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Submit

Close

Revision #5

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