Filtering, Generating and Downloading Reports Example

Reporting Examples · https://learn.logisense.com/docs/724008961/

Summary

Reports set up in LogiSense Billing can be used to retrieve data from the system and provide it in a pdf or csv format. In this article we will cover how to filter, generate and export the Account Contacts core report.

Prerequisites

- Core reports can be generated as needed, there are no prerequisite configuration steps.

Sample Configuration

Generating a report

1. Log into the LogiSense Billing application
2. Click on **Setup** and under the **Extensibility** section click on **Reports**
3. Click on the report you would like to customize by filtering its data. In this example we add a filter to the ‘Account Contacts’ report.
4. Add a filter you wish to apply. For example, a filter can been added to only include account data if the accountId is greater than ten
5. Click on the **Reports** menu.
6. Click on the ‘Account Contact’ report. Click on the **Filters** tab and then on the dropdown. Select the filter you wish to apply for this report and click on **Add**
7. Click on the **Report** tab and click on **Generate** icon
8. This will show a notification that the report generation is in progress.

9. Once the report is generated, another notification is shown that the report is generated.
10. Go the **Report** tab and click on download icon to download the report.

Report is downloaded in pdf format to the local system from the **Report** tab. The LogiSense Billing UI also shows the report along with the date it was generated and the user that generated it.