Run a Report

You can use this quick reference guide as a fast reminder of the basic steps for running a report.

1. Select the Reporting high-level task.
2. Select the category for the report you want to run.
3. Click the report’s name link.
4. Specify report criteria, such as date range, sorting preferences, and output preferences.
5. Click the Run Report button.
6. Click a link to drill down to additional detail, if available.

Program Management

Spend

Account Spend Analysis
Summary of account spending (excluding merchant).

Cash Advance
Detail of account cash advances including transaction date, and reference number.

Declining Balance/Refund
Earnings from returned merchandise.

Order File History

Order File Load Date: [Input]
Sort Report By: [Ascending/Descending Order]
Report Output: [PDF]

Learn More: For more detailed information, refer to the Reporting web-based training lesson and user guide available at: https://wbt.access.usbank.com

Contact your Program Administrator for the most current passwords.

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