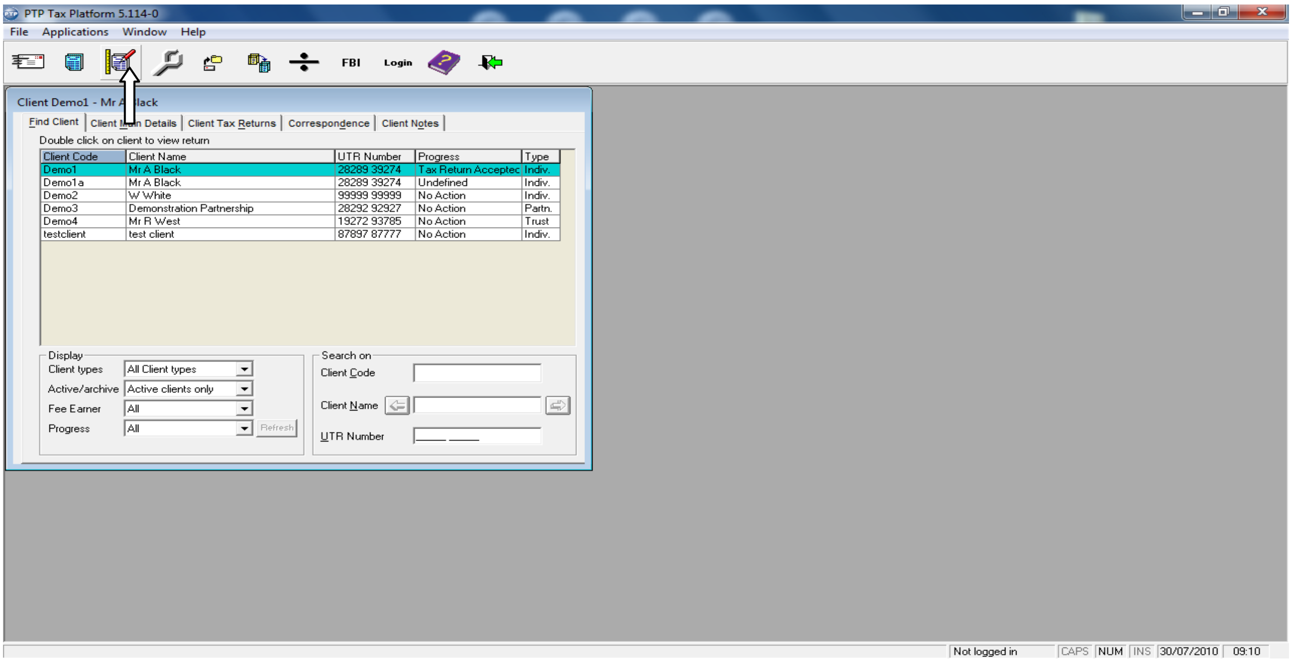
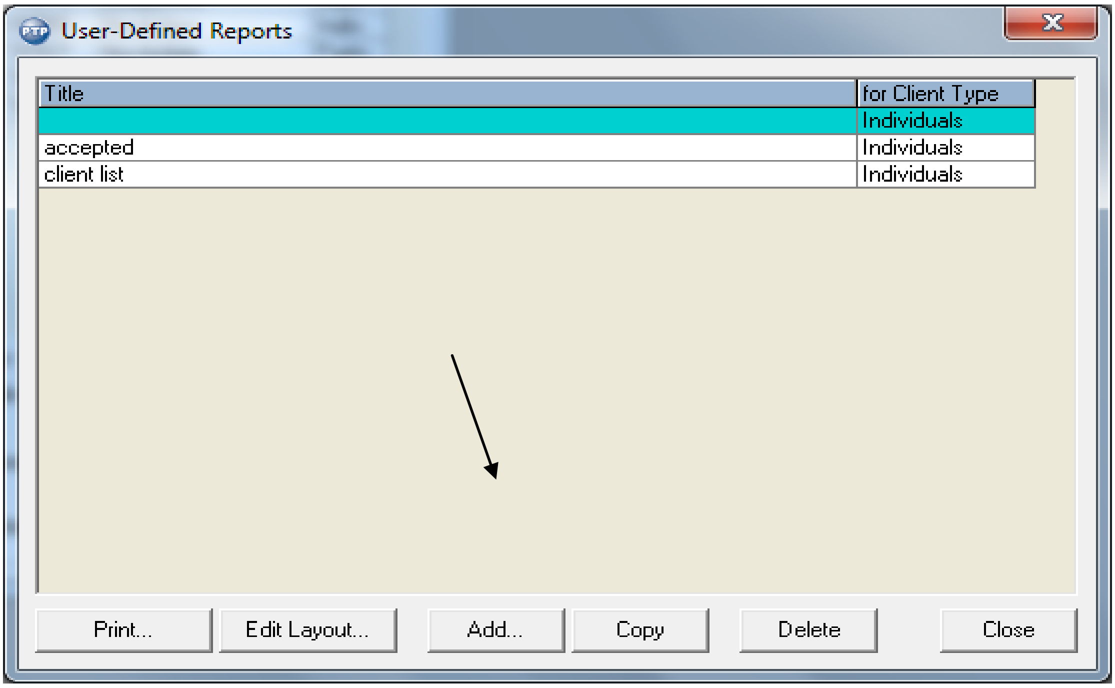
Creating user defined reports and reporting on event dates

Step 1 – Creating the User defined report

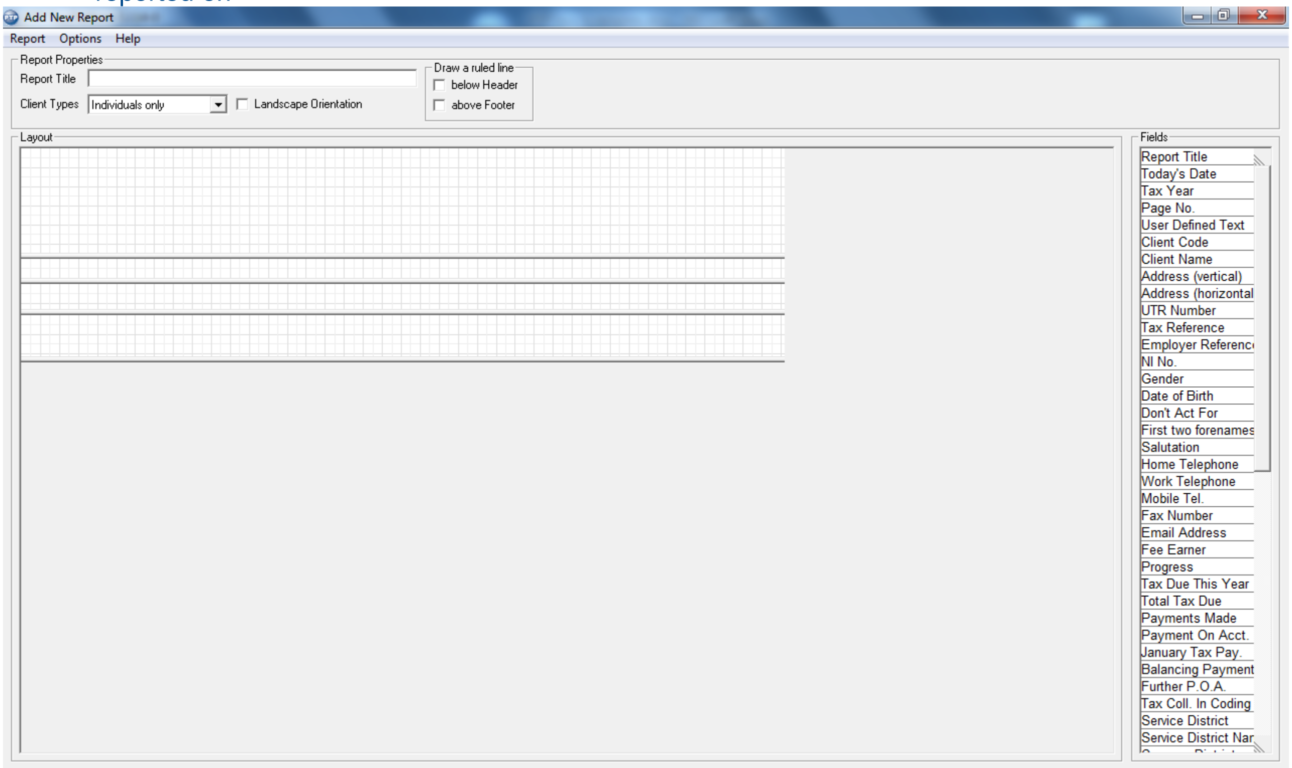
- Launch tax platform and click the third icon on the toolbar



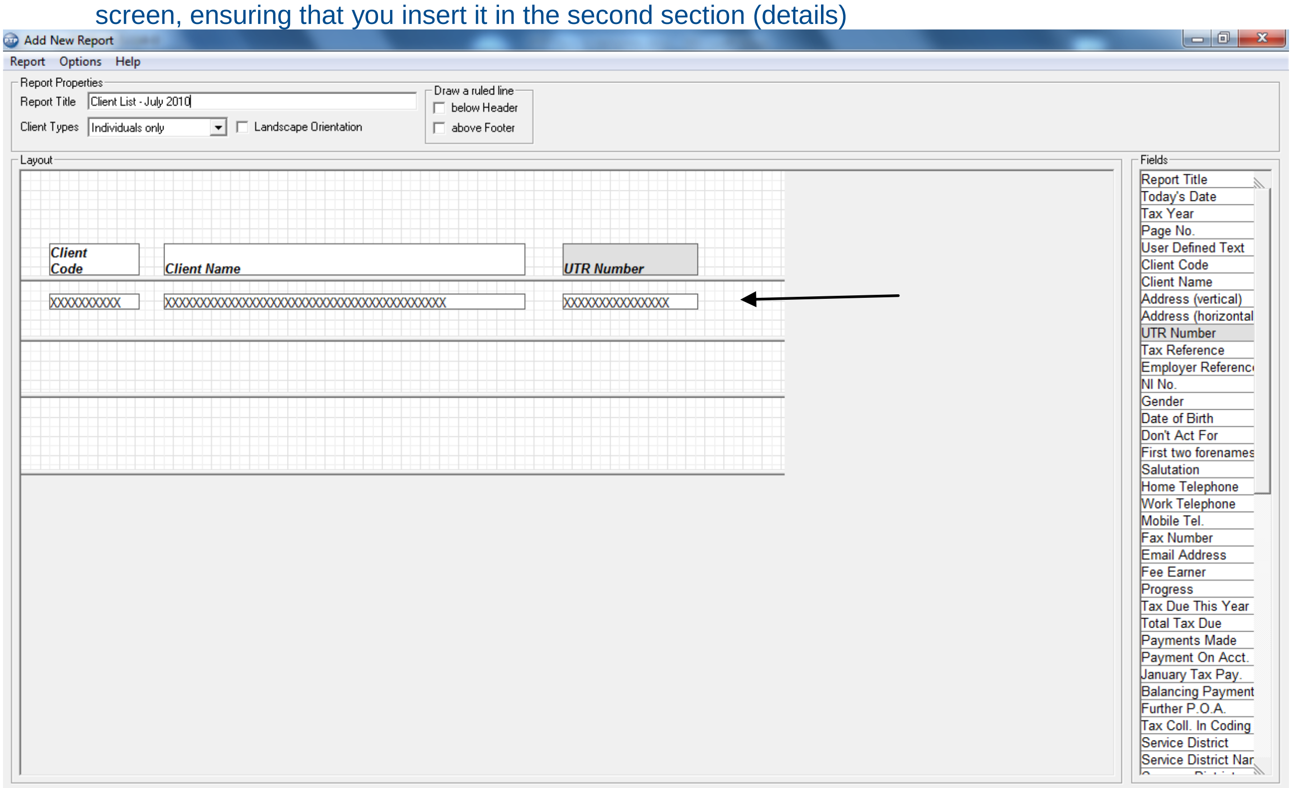
- This will then display a screen showing any previous user defined reports set up and also the facility to add new reports – click Add



- This then views the screen where you build the template of the report, and this section is split into four – Header, detail, totals and footer. On the right hand column it displays all the fields that can be reported on



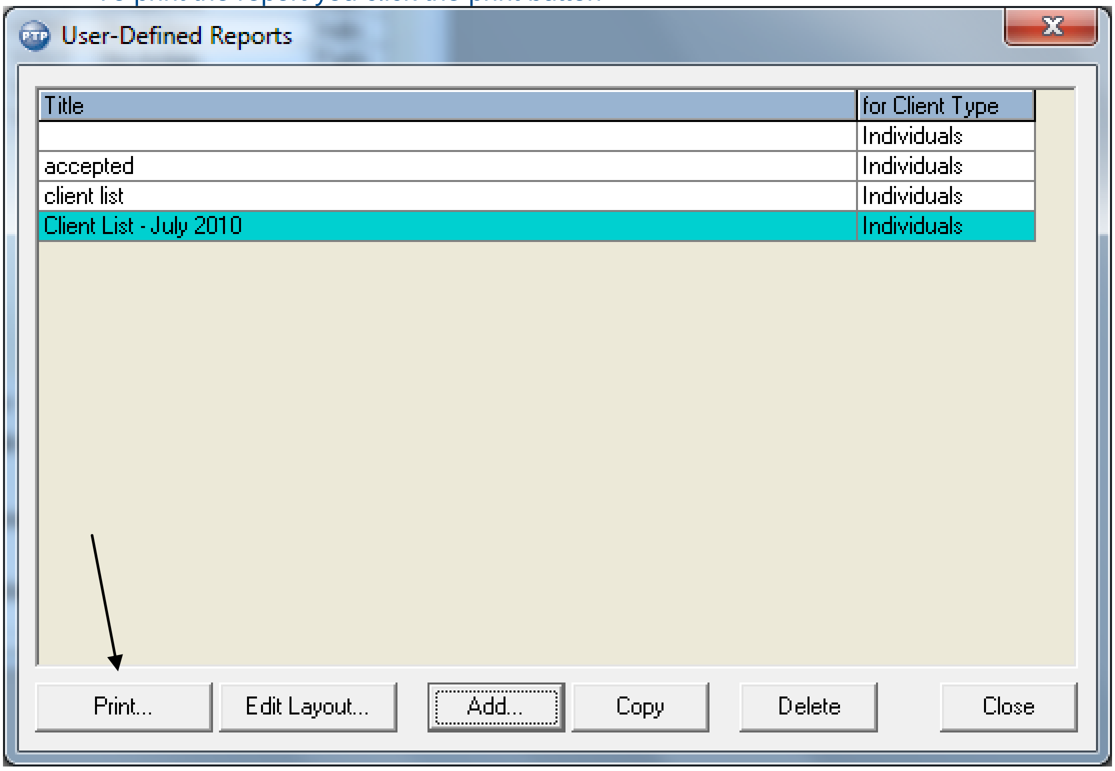
- You enter a report title, and then click the relevant field and drag across to the left hand side of the screen, ensuring that you insert it in the second section (details)



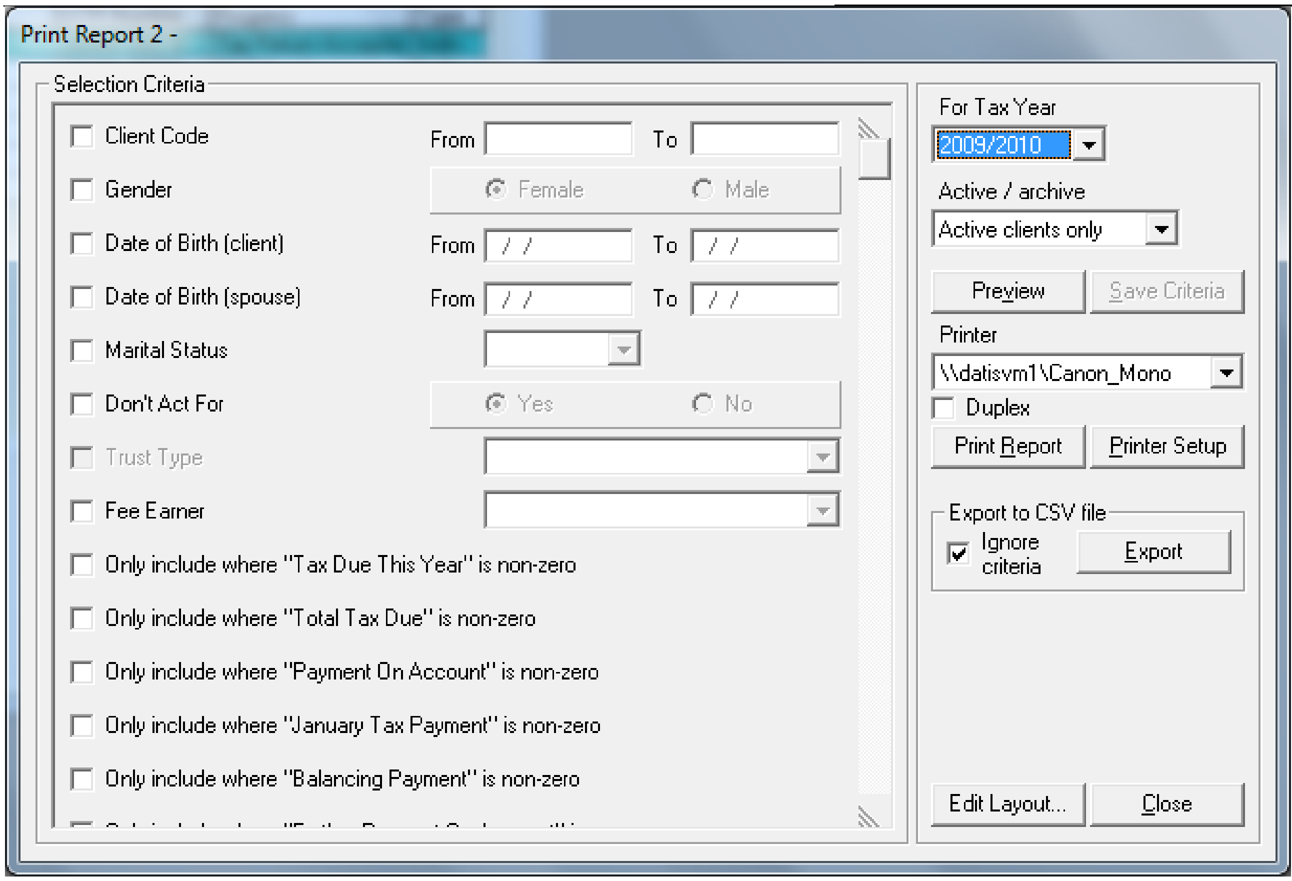
- The report should be displayed as above, with the title appearing in the header section, and then the boxes of X's in the detail section. Once the report has been completed you close and click yes to save changes

Step 2 – Producing the report based on event dates

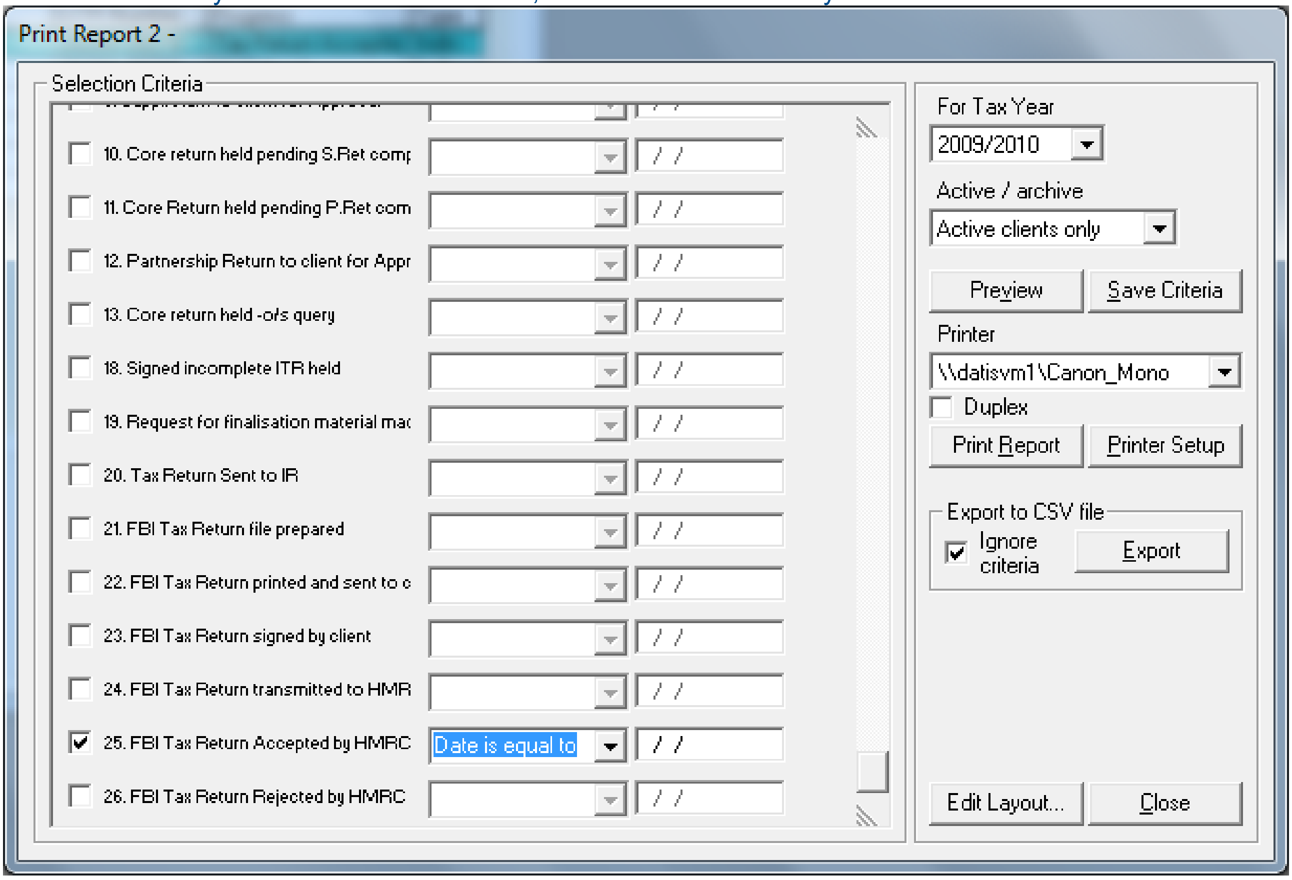
- To print the report you click the print button

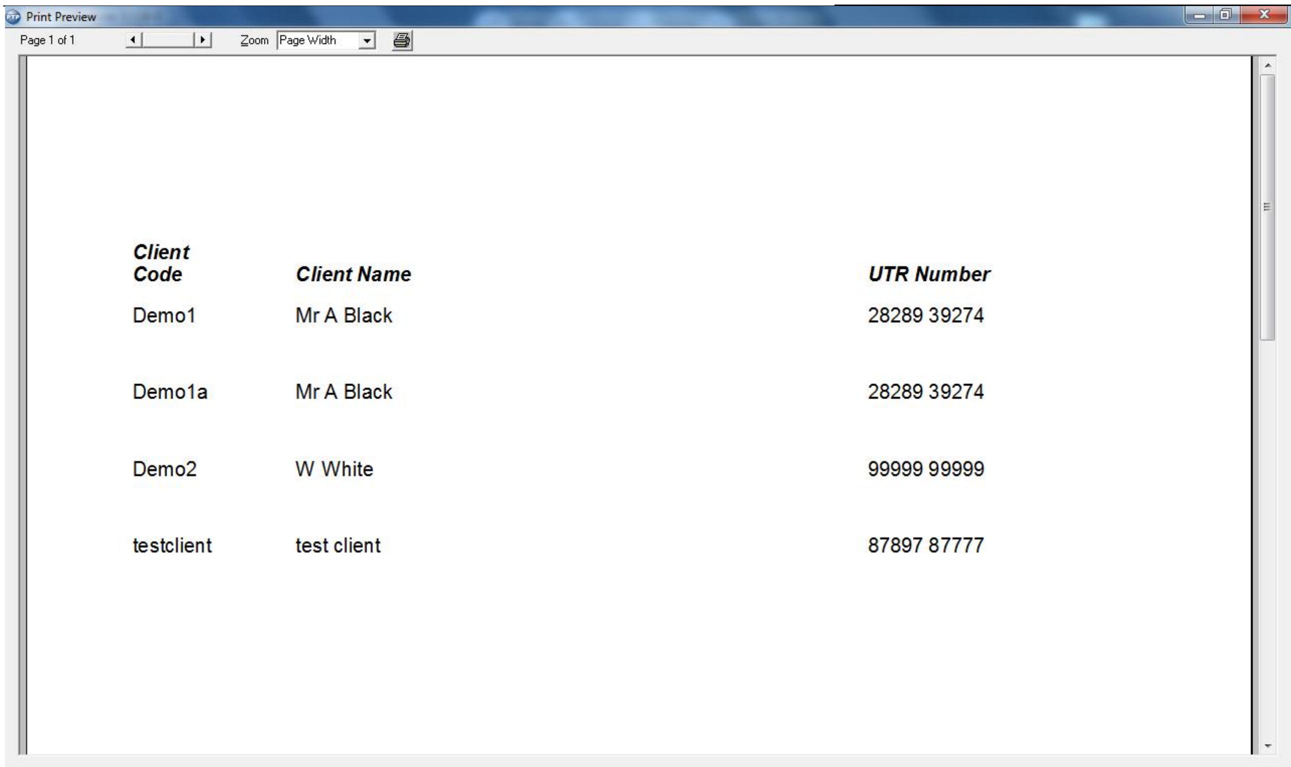


- This will display the print window where you can select certain criteria and printing options, and also filter on client type and tax year


Print Report 2 -
Selection Criteria
Client Code
From
To
Gender
Female
Male
Date of Birth (client)
From / /
To / /
Date of Birth (spouse)
From / /
To / /
Marital Status
Don't Act For
Yes
No
Trust Type
Fee Earner
Only include where "Tax Due This Year" is non-zero
Only include where "Total Tax Due" is non-zero
Only include where "Payment On Account" is non-zero
Only include where "January Tax Payment" is non-zero
Only include where "Balancing Payment" is non-zero
For Tax Year
2009/2010
Active / archive
Active clients only
Preview
Save Criteria
Printer
\\datisvm1\Canon_Mono
Duplex
Print Report
Printer Setup
Export to CSV file
Ignore criteria
Export
Edit Layout...
Close

- To report on event dates you select the event you want, and then select a date range, such as date is on or before, or date is equal to. You can also produce a report showing clients that haven't yet been acted on, such as Clients not yet filed online. To do this you would select event 25, date is equal to and then leave the date box blank and then click preview and this will then show all clients that don't yet have a date in event 25, therefore all clients not yet filed





Client Code	Client Name	UTR Number
Demo1	Mr A Black	28289 39274
Demo1a	Mr A Black	28289 39274
Demo2	W White	99999 99999
testclient	test client	87897 87777

- The reports can also be exported into csv file in excel. This is done by clicking the export button on the print window