Print the Monthly Report

Note: A monthly report requires collection records.

To learn more about collection records and monthly reports, visit the Ledger Menu.

Step One: Create Collection Records

There are two ways to complete this.

Way One: Export Report

- 1. From the main menu, click on [Reports].
- 2. Click on [Export Report].
- 3. Fill out the teal box accordingly; visit the Export Report page for assistance.
- 4. When prompted with "Create ledger entries for this report?" click yes.

Way Two: Create Collection Records

- 1. From the main menu, click on [Ledger].
- 2. Click on [Create Collection Records].
- 3. Fill out the teal box accordingly; visit the Dates and Tax Type page for assistance.
- 4. Click [OK].

Step Two: Print Monthly Report

- 1. From the main menu, go to [Ledger].
- 2. Click on [Monthly Report], and fill in the information accordingly.
- 3. Once generated, click on "Print" in the top left of the screen.
- 4. Print the report.

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