

Saved Search & Report Training

Time	Topic	Description
10:00 AM - 11:00 AM	Saved Search Overview	Defining a Saved Search Review Search Types Review Dashboard, List and Sublist View Create a Customer Search How to use Criteria Expressions
11:00 AM – 11:30 AM	Transaction Search	Create a Transaction Search. Review Header and Line fields Review Available Filters
11:30 AM – 12:00 PM	Grouping Results and Functions	Create a Transaction Search with Grouped Columns How/When to use grouping Review Summary Criteria Review Functions
12:00 PM - 12:15 PM	15mins Break	
12:15 PM -12:45 PM	Email Alerts	Create search that send emails Review Scheduled Emails/Alerts
12:45 PM – 1:30 PM	Reports	Reports Overview Create a Saved Report Create a Financial Saved Report
1:30 PM - 2:00 PM	Summary and Wrap Up/Q&A	