EQUIFAX

Client Training HQ

Creating an A/R Report

To create a specific A/R Report:

1. Select **Reports** from the left navigation menu.
2. From the **Report Type** drop-down menu, select **A/R Report**.
3. Click **View**.
4. A default Firm Activity Report will appear. You can use this default template or click **New Template** to add a new report.
5. If using the default template, proceed to the next step. If adding a new template, enter a name for the report, and then click **Update Settings**.
6. Select the following report filter options:
   - **Shared** or **Private**
   - **Report Type**
   - **Scope**
   - **Level**
   - **Show FN's**
   - **Date Range**
   - **Group By**
7. Click **Update Settings** to save your changes.
8. Click **Run Report** to generate the report, or for reports over 1,000 records, schedule the report to run on a specific day by selecting a day of the week from the **Automatic Update** pop-up menu.

   Note: There are limits on the overall size of any single report. Manually run reports have a limit of 1,000 records. Scheduled reports are limited to 5,000 records. Reports containing more than 10,000 records cannot be produced. To determine if your report is within these limits, click **Calculate**.

More Training Available!

Check out additional training resources available on our site, Connections.

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.