Here are some handy tips that you may or may not be aware of. Roger Farmer, Support Team Lead has put highlighted three processes that you can use in our software.

1. **How to save reports in to CSV (excel format)**

To save reports into a CSV file, you are just clicking on the "Save File Type" menu….it automatically defaults to PDF but you may not know that there is a drop-down box and you can save as other formats. Quite useful for some councils if you need to work on budgets in Excel!
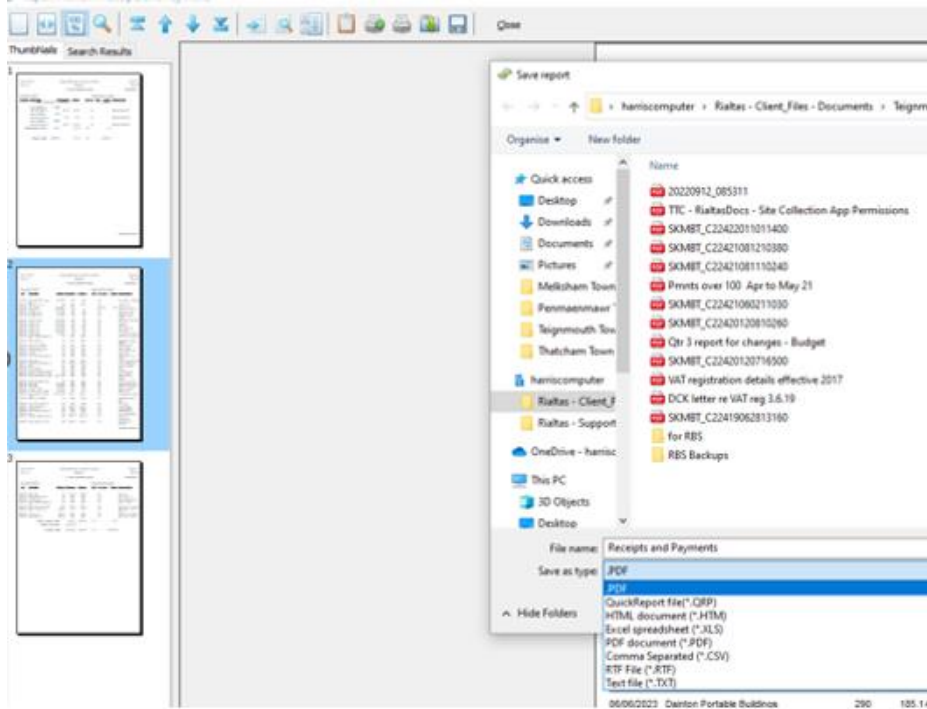
2. **Using the search button within reports to find items**

You may not be aware that ALL reports can be searched for. On the screenshot below the magnifying glass in middle (not large one on left) can be used to search for any text i.e. a nominal code, customer name or monetary amount.
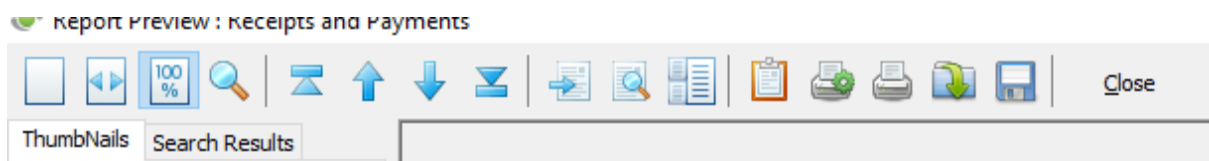
3. **How to find payments/receipts in Audit**

When you go into Audit, you will see the Cashbook or Nominal Ledger. If wanted you search on any date you can leave these fields blank. The totaling exactly can be changed to "totaling at least", so for instance if you wanted a list of payments over £500 to publish on your website this can be used then.