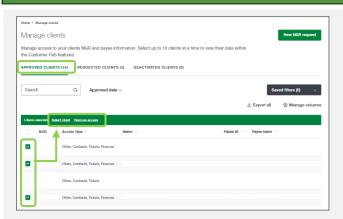


## **Advisor Reports Guide**

You can access a variety of reports in the Customer Hub. The reports available to you will depend on the role type assigned by your admin user; Broker, Accountant, or both. To access reports, sign into the Customer Hub and click the 'Manage Clients' tile.

## 1. Select the NGRs you want to work with in Manage Clients





- Select the NGRs you want to work with in the table (maximum of 10 at a time) and click 'Select Client' in the green activity bar.
- 2. Click the 'Reports' tile on the home page.

\*The available features will depend on the access type the client has approved for the advisor organisation.

## 2. Reports Dashboard ver (\* figets\* Reports ver (\* figets\* reports ver (\* figets\* ver (\* figets

- 1. The reports page has four tabs:
- **Favorites:** Customise favourites to include all the reports you use regularly. Check or uncheck the flag on a report tile in any tab to add/remove reports to the favourites tab.
- Finance: available for users with accountant access
- Tickets / Market Pricing: available for users with broker access

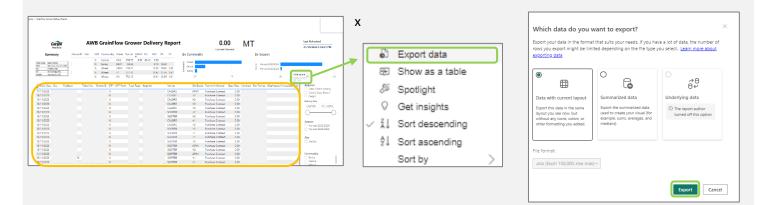
													COMPAN	·
	argill	AW	<b>VB</b> Grai	inFlow G	Frower De	livery Rep	ort		1.56	K	MT		COMPANY	
							-		6					
Sum	nary	GroverD Ste			Tonnes ADMX OI		By Com	modity				By Season		FARMING
	ng ( un une l'annen (k) er (%) er (%) er (%)	1 Caller	ds Ni Carr	da CANG	853,46 1.02 47	11 440	and the second		540		1.016	) - ramon 2023/2024		
livery Date	Ste Pa	ddock Ticket N	io. Grovert	OFP OFP Fan	m Truck Rego Acq	Anar Navi	ny	Bin Grade	Payment Method	Bace Rate	Contract	Net Tonnes . Glyphosate (1-	a	
11/2023	Calciands			0.NL	Carg	R RO	(第二41/30)(第	CANS	Purchase Contract	0.00		16.24		
	Opidands			N	Card		SEER ANY TO ITE!		Purchasa Coveract	0.00		19.02		
11/2023	Califands													
				N	Carg	a PO	ALL OCYAL REAL	CANIS	Purchase Contract	0.00		\$1.82		
11/2023	Calienda			N.	Carg	a PO a PO	ALER ALVIO (RR) ALER ALVIO (RR)	CANIS	Purchase Contract Purchase Contract	0.00		\$1.82 25.26		
11/2023	Oaklands Oaklands			N N	Card Card Card	a RO a RO a RO	elik alvid (rr) elik alvid (rr) elik alvid (rr)	CANG CANG CANG	Purchase Contract Purchase Contract Purchase Contract	0.00		\$1.82 25.26 51.20	- (	616000 612000
11/2023 11/2023 11/2023	Caklands Caklands Oaklands			N N N	Carl Carl Carl	a RO a RO a RO	4588 44730 (RR) 4588 44730 (RR) 4588 44730 (RR) 4588 44730 (RR)	CANS CANS CANS CANS CANS	Purchase Contract Purchase Contract Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00		\$1.82 25.26 51.20 27.52	- (	676303 672303 OH
11/2023 11/2023 11/2023 11/2023	Caklends Oaklands Oaklands Oaklands			N N N		a 20 8 20 8 20 8 20 8 20 8 20	4528 444/30 (88) 4558 444/30 (88) 4558 444/30 (88) 4558 444/30 (88) 4558 444/30 (88)	CANG CANG CANG CANG CANG	Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00 0.00		51.82 25.26 51.20 27.52 54.16		694000 612000 O-(
11/2023 11/2023 11/2023 11/2023 11/2023	Caklands Caklands Oaklands Oaklands Caklands			N N N N		a RO R RO R RO R RO R RO R RO R RO	400 ALVIO (H) 400 ALVIO (H) 400 ALVIO (H) 400 ALVIO (H) 400 ALVIO (H) 400 ALVIO (H)	CANG CANG CANG CANG CANG CANG	Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00 0.00 0.00		51.82 25.26 51.20 27.52 34.16 26.70		O-(
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Caklands Oaklands Oaklands Oaklands Oaklands Oaklands			N N N N		a PO a PO a PO a PO a PO a PO a PO	400 44430 (44) 400 4430 (44)	CANG CANG CANG CANG CANG CANG CANG	Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00 0.00 0.00		51.82 25.26 51.20 27.52 54.16 26.70 53.26		
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Caklands Oaklands Oaklands Oaklands Oaklands Oaklands Oaklands			N N N N N		a PO a PO a PO a PO a PO a PO a PO a PO	400 4440 149 459 4440 (89) 459 4440 (89) 459 4440 (89) 459 4440 (89) 459 4440 (89) 459 4440 (89) 459 4440 (89)	CANG CANG CANG CANG CANG CANG CANG CANG	Ruchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00 0.00 0.00 0.00		51.02 25.25 51.20 27.52 54.10 35.20 31.20 33.20 24.74		O-(
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Caklands Oaklands Oaklands Oaklands Oaklands Oaklands Oaklands Oaklands			N N N N N N		8 PO 8 PO 8 PO 8 PO 8 PO 8 PO 8 PO 8 PO	4228 42430 (88) 4228 42430 (88)	CANG CANG CANG CANG CANG CANG CANG CANG	Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0		51.82 25.26 51.20 27.52 54.16 28.70 83.26 24.74 52.04		Season Mervent 2023/2024
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Calilands Calilands Calilands Calilands Calilands Calilands Calilands Calilands Calilands Calilands Calilands Calilands			N N N N N N N		8 90 8 90 8 90 8 90 8 90 8 90 8 90 8 90	428 44/30 (H) 428 44/30 (H)	CANG CANG CANG CANG CANG CANG CANG CANG	Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0		\$1.82 35.28 51.20 27.52 54.16 28.70 83.24 24.74 82.74 82.72		5400400 Henvert 2023/2024
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Celtends Celtends Celtends Celtends Celtends Celtends Celtends Celtends Celtends Celtends			N N N N N N		8 90 8 90 8 90 8 90 8 90 8 90 8 90 8 90	420 ALV/30 (RF) 4258 ALV/30 (RF)	CANG CANG CANG CANG CANG CANG CANG CANG	Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0		51.82 35.26 51.20 27.52 54.96 38.70 31.26 34.74 52.84 52.84 52.84 52.84 52.84 52.84 52.84 52.84 52.84 52.84 52.84 52.84 52.84 52.84 52.84 52.84 53.26 54.555		Season Mervent 2023/2024
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Celtends Celtends Celtends Celtends Celtends Celtends Celtends Celtends Celtends Celtends			N N N N N N N	3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	a PO N PO N PO N PO N PO N PO N PO N PO N	428 44/30 (H) 459 45/28 (H) 459 45/28 (H)	CANIG CANIG CANIG CANIG CANIG CANIG CANIG CANIG CANIG CANIG CANIG CANIG	Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0		51.82 35.26 51.20 27.92 36.16 36.70 53.26 36.70 53.26 36.74 32.74 32.74 32.72 28.00 51.28		5400400 Henvert 2023/2024
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands			N N N N N N N		a 20 a 20	420 ALC/10 (01) 4258 ALC/10 (02) 4258 ALC/10 (02) 4259 AL	CANS CANS CANS CANS CANS CANS CANS CANS	Purchaia Contract Purchaia Contract	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0		\$1.42 35.26 51.20 27.52 54.16 38.10 52.26 32.54 32.54 32.72 28.02 51.28 32.72 28.02 51.28 32.42		Season Proven 2023/2024 Site Califands
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands			N N N N N N N N N N		a 20 a 20		2013 2015 2015 2015 2015 2015 2015 2015 2015	Purchas Contract Purchas Contract	000 000 000 000 000 000 000 000 000 00		51.82 35.26 51.20 27.52 34.10 31.26 31.26 32.24 32.24 32.24 32.24 32.24 32.24 32.24 32.24 32.24 32.24 32.25 31.28 32.20 51.28 32.26 52.20 52.50 52.20		5400400 Henvert 2023/2024
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands					a ao a ao a ao a ao a ao a ao a ao a ao	428 44/30 101 429 44/30 100 428 44/30 100 400 400 400 400 400 400 400 400 400	CANG CANG CANG CANG CANG CANG CANG CANG	Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0		\$1.42 35.26 51.20 27.52 54.16 38.10 52.26 32.54 32.54 32.72 28.02 51.28 32.72 28.02 51.28 32.42		Season Season Herven 2022/2024 Site Commachy Commachy
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands Calitands			N N N N N N N N N N		a         PO		CANS CANS CANS CANS CANS CANS CANS CANS	Purchas Contract Purchas Contract	000 000 000 000 000 000 000 000 000 00		51.02 25.20 27.52 54.10 20.70 50.20 20.74 52.64 30.77 30.02 51.02 31.02 51.025		Season Planners 2023/2024 Site Community Canools
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Opicents Opicents Opicents Opicents Opicents Opicents Opicents Opicents Opicents Opicents Opicents Opicents Opicents Opicents Opicents Opicents Opicents			N N N N N N N N N N N N N N N N N N N		à         PO           a         PO		CANG CANG CANG CANG CANG CANG CANG CANG	Purchas Contract Purchas Contract	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0		51.82 25.20 51.20 27.52 34.16 81.26 34.70 81.26 34.74 36.72 20.02 51.28 34.40 35.260 11.28 31.28		Seasen Seasen Site Contracts Commadity Contracts Bin Strade
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Optients Optients Optients Optients Optients Optients Optients Optients Optients Optients Optients Optients Optients Optients Optients Optients Optients					a Por a		CANG CANG CANG CANG CANG CANG CANG CANG	Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0		1122 2152 2152 2152 2152 2152 2152 2152		Seean Henner 2023/2024 Site Commadity Commadity Note: Note: Site Addition
11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023 11/2023	Caklends Caklends			N N N N N N N N N N N N N N N N N N N		a     b     c		CANG CANG CANG CANG CANG CANG CANG CANG	Purchase Contract Purchase Contract	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0		51.02 35.06 35.20 35.50 35.50 35.50 35.70 35.24 35.74 35.74 35.74 35.74 35.74 35.75 35.75 35.75 35.20		Seasen Seasen Site Contracts Commadity Contracts Bin Strade

2. Select the NGR you want to view details for in the top right-hand corner of the screen.

Reports can be filtered as required with the available sliders and check box filters.



## 3. Exporting Reports



To export a report:

- Click on your data to select it. This is the area with the individual ticket details displayed and outlined in orange above.
- 2. Open the 'More Options' menu by clicking the image of three dots ('...') found on the top right-hand corner of your data, outlined in green above.

\*Note: If you click on the More Options icon ('...') anywhere else on the report, the reports details will not download to excel. 3. Select 'Export Data from the pop-out menu 4. Click the 'Export' button.

The data will be downloaded to your device in an excel spreadsheet.