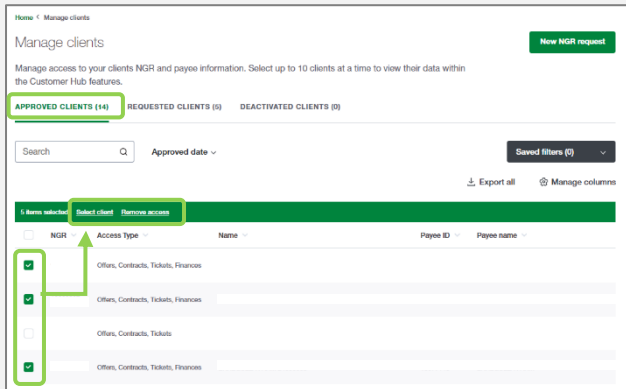


Advisor Reports Guide

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

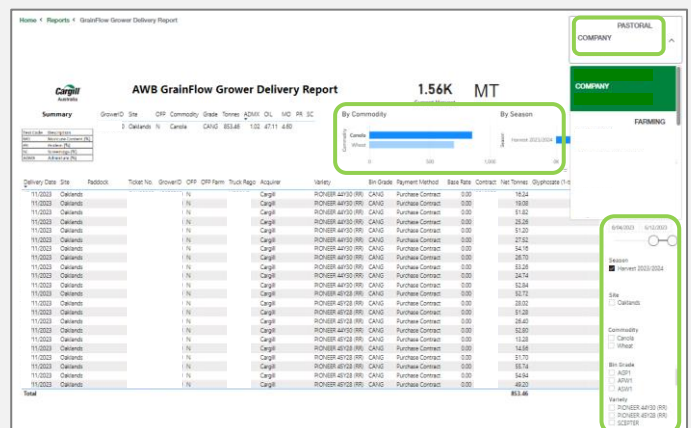
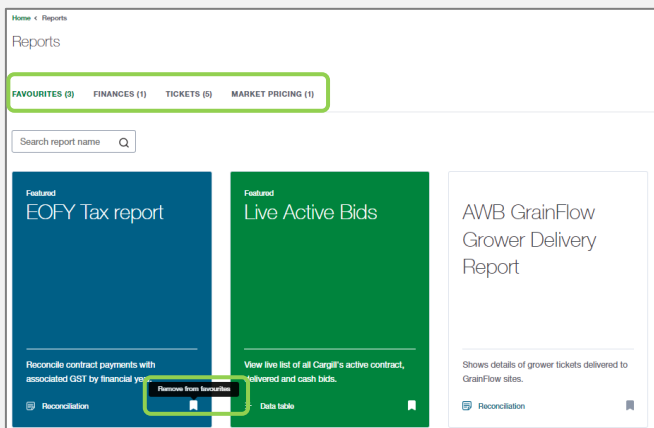


1. Select the NGRs you want to work with in the table (maximum of 10 at a time) and click 'Select Client' in the green activity bar.

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



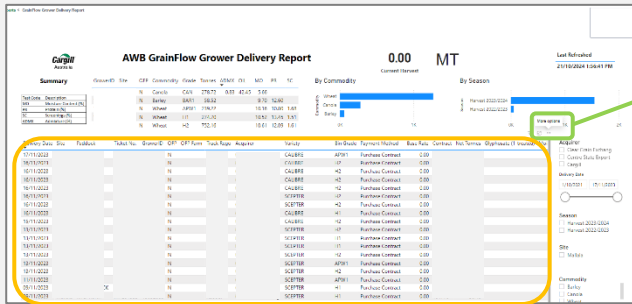
1. The reports page has four tabs:

- **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

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



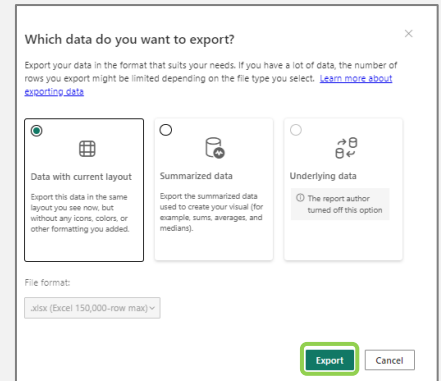
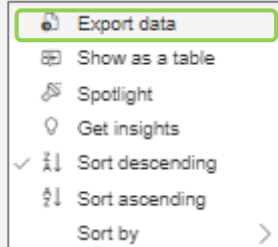
AWB GrainFlow Grower Delivery Report

0.00 MT

21/10/2024 12:41 PM

Order No.	Order Date	Order Type	Order Status	Order Value	Order Weight	Order Volume	Order Location	Order Commodity	Order Season
101012022	15/10/2022	N	Complete	198.75	2,221.42	2,221.42	CA0001	Wheat	2022
101012023	15/10/2023	N	Complete	188.22	2,116.34	2,116.34	CA0002	Wheat	2023
101012024	15/10/2024	N	Complete	198.75	2,221.42	2,221.42	CA0003	Wheat	2024

X



To export a report:

1. 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.