How to Generate a Report

Reports are essential documents to help you better understand your shipping business.

A. To access the reports available to you; click on the "My Orders" Icon on the Navigation menu on the left.
B. From the "My orders" screen, click on the **Generate Report** dropdown to see a list of available reports for your account.
   - The two main reports available are the **"Order Details Report"** and the **"Order Export Self-Serve Report."**
   - Select the report you would like to create. Upon selecting the report, a new browser tab will open.
     - The "Order Details" report gives you the ability to enter date parameters.
       2. To do this, click on the report from the dropdown and select the "Date from" and "Date to" dates from the calendar on the right side of your screen.
       3. Click the preview button at the bottom to see the report.
   - Once you create the report you can export it into any format you would like by hovering over the download arrow on the top tool bar
   - Click on the export format you would like, and the report will be exported.
     - If you are using Chrome as your browser, you will see a pop-up of the exported file at the bottom left corner of your screen, click on the file to open it and use and save as needed.
     - If you are using a different browser, you will be asked where you would like to save the file, make your selections, and hit save to complete.
C. You also can export the "Order table" in its exiting format.
   - To export the order table, you first need to click on the Orders tab to get back to your "My Orders table".
   - From the "My Orders Table" click on the gear icon and select **Export Data** to download an Excel file of your order details
     - If you are using Chrome as your browser, you will see a pop-up of the excel file at the bottom left corner of your screen, click on the excel file to open it and use and save as needed.
     - If you are using a different browser, you will be asked where you would like to save the file, make your selections, and hit save to complete.

   DASHBOARD's simplicity makes it easy to understand your shipping business! Place an order today!