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# Set up and run reports on your invoices



Hello, this video was designed to show you how easy it is to view and create custom reports via the Tungsten Network portal. Tungsten Network offers a variety of reporting features accessible to our customers. During this tutorial I will show you how to view reports related to invoices and credit notes submitted, how to view and download custom reports and finally how to download copies of invoices or credit notes previously submitted to your customer via Tungsten Network.

From the home page, go to the “Reporting” link in the main menu. Click “Invoices submitted”.

The screenshot shows the Tungsten Network portal interface. At the top, there is a header with the AOS logo, the text "Welcome Elise", and navigation links for "My Account", "Help & Support", and "Log Out". Below the header is a search bar with the placeholder text "Search for your invoice by invoice number, PO, trx number". The main navigation menu includes "Home", "Invoicing", "My POs", "Customers", "Reporting", and "Early payment". The "Reporting" menu is open, showing options: "My reports", "Invoices submitted" (highlighted with a red box), "POs received", "Remittances received", "289 bis partner", "Tungsten Network billing report", and "Dynamic Discount history".

Below the navigation menu, there are three main sections:

- Connect with your customers:** Search and connect to more of your customers in a few clicks. Includes buttons for "CONNECT TODAY" and "VIEW ALL".
- Check the status of your invoices:** Track the latest status of your invoices in real-time. Includes a button for "WHERE IS MY INVOICE?".

Below these sections is a "For your attention" section with a table:

Type	Count	Date	Customer
Failed invoices	1		

Below the "For your attention" section are two tables:

Number	Supplier	Buyer
ShuchitestPayment1	Adams Office Supplies (IT) - Test	Tungsten Network - Demo Account

Number	Buyer	Amount
shuchitestPolandInv	AAA168149359	11.90

To maximize your search results, it's best to start with the date category field. Once your selection has been made from the drop down menu, please move to the date range field. Select a date range or a custom date range. Once the date category and range have been selected, select which customers you would like returned in your search results. It's important to update the invoice status selection prior to generating your report. If reporting on invoices or credit notes in multiple status, please ensure all boxes are checked. Click "More fields" to expand the search criteria section.

Welcome Elise

My Account Help & Support Log Out

Adams Office Supplies (IT) - Test Search for your invoice by invoice number, PO, trx number

Home Invoicing My POs Customers Reporting Early payment

### Invoice submitted Help with this page

Run, view and save reports on the invoices you have submitted

#### Criteria

Select date category  
Submission date

Select date range   
Last 30 days

Select Tungsten Network accounts  
3 selected

Select customer  
6 selected

Select invoice status  
13 selected Invoice status definitions

[>> More fields](#)

#### Saved report name

- [Default] Invoices Sent (7 Days)
- [Default] Invoices Sent (This Month)
- Invoices Pending Payment
- Q1 Invoices
- Q1\_Invoices

[RUN](#) [SAVE AS](#) [EXPORT](#) [RESET](#)

Select the currency and invoice type from the drop down menus. If searching for a specific invoice or credit note, enter the number, gross amount or purchase order number in the specified fields. Your report is ready to be created. Prior to generating the report, please update the report content from the drop down menu. This will ensure the results returned are specific to your reporting needs.

Now it's time to determine if you would like to generate the report to display on your screen, save the report under "My reports" or export the report in the Excel or CSV format. To display the report on your screen, click "Run".

Welcome Elise

Adams Office Supplies (IT) - Test

Home Invoicing My POs Customers Reporting Early payment

Search for your invoice by invoice number, PO, trx number

Help with this page

### Invoice submitted

Run, view and save reports on the invoices you have submitted

**Criteria**

Select date category: Submission date

Select date range: Last 30 days

Select Tungsten Network accounts: 3 selected

Select customer: 6 selected

Select invoice status: 13 selected

Select currency: 81 selected

Select invoice type: 2 selected

Invoice number

PO number

Gross amount

Select report content: 17 selected

<< Less fields

Invoice status definitions

**Saved report name**

- [Default] Invoices Sent (7 Days)
- [Default] Invoices Sent (This Month)
- Invoices Pending Payment
- Q1 Invoices
- Q1\_Invoices

RUN SAVE AS EXPORT RESET

The report contains all fields selected from the report content drop down menu. After reviewing the report, click the question mark icon if you have any questions or concerns related to the returned results. Clicking the question mark will allow you to create a support ticket with the Tungsten Network help desk.

Report results									
Ticket	Image	Invoice date	Invoice number	Invoice status	Invoice type	Submission date	Collection date	Supplier name	
		25/04/2018	1011	Accepted	Invoice	25/04/2018		Adams Office Supplies (US)	
		21/03/2018	INV5711111	Accepted	Invoice	21/03/2018		Adams Office Supplies (US)	
		15/03/2018	ShuchitestPayment1	Failed	Invoice	15/03/2018		Adams Office Supplies (IT) - Test	
		14/03/2018	INV544182	Accepted	Invoice	14/03/2018		Adams Office Supplies (US)	
		14/03/2018	INV2145	Accepted	Invoice	14/03/2018		Adams Office Supply APAC	
		14/03/2018	INV2356871	Accepted	Invoice	14/03/2018		Adams Office Supplies (US)	
		13/03/2018	ShuchiFRTest	Accepted	Invoice	15/03/2018		Adams Office Supplies (IT) - Test	
		21/02/2018	INV4718923	Accepted	Invoice	21/02/2018		Adams Office Supplies (US)	
		21/02/2018	INV416283	Accepted	Invoice	21/02/2018		Adams Office Supplies (US)	

Page size: 10 | Displaying page 1 of 99, items 1 to 10 of 984

DOWNLOAD INVOICE

### Adams Office Supplies (IT) - Test

Search for your invoice by invoice number, PO, trx number

13 selected

>> More fields

RUN

Report results

Please indicate what your request relates to

- An invoice or many invoices
- A purchase order or many purchase orders
- I have a suggestion
- Something else

Enter invoice numbers

Add one or more invoice numbers

ADD

Invoice number	Customer	Customer TN number	Status
1011	Tungsten Network - Demo Account	AAA894939602	Accepted

Please enter a subject for your request

Please describe your request in as much detail as you can










Attachment

SELECT AND UPLOAD

You have been set up to receive alerts.

Share ticket?

If you would like to download a copy of an invoice or credit note that has been delivered to your customer, click the image icon. If you included an attachment with your electronic invoice or credit note, the attachment will be found here.





Report results									
Ticket	Image	Invoice date	Invoice number	Invoice status	Invoice type	Submission date	Collection date	Supplier name	
<input type="checkbox"/>		25/04/2018	<a href="#">1011</a>	Accepted	Invoice	25/04/2018		Adams Office Supplies (US)	
<input type="checkbox"/>		21/03/2018	<a href="#">INV5711111</a>	Accepted	Invoice	21/03/2018		Adams Office Supplies (US)	
<input type="checkbox"/>		15/03/2018	ShuchitestPayment1	Failed	Invoice	15/03/2018		Adams Office Supplies (IT) - Test	
<input type="checkbox"/>		14/03/2018	<a href="#">INV544182</a>	Accepted	Invoice	14/03/2018		Adams Office Supplies (US)	
<input type="checkbox"/>		14/03/2018	<a href="#">INV2145</a>	Accepted	Invoice	14/03/2018		Adams Office Supply APAC	
<input type="checkbox"/>		14/03/2018	<a href="#">INV2356871</a>	Accepted	Invoice	14/03/2018		Adams Office Supplies (US)	
<input type="checkbox"/>		13/03/2018	<a href="#">ShuchiFRTTest</a>	Accepted	Invoice	15/03/2018		Adams Office Supplies (IT) - Test	
<input type="checkbox"/>		21/02/2018	<a href="#">INV4718923</a>	Accepted	Invoice	21/02/2018		Adams Office Supplies (US)	
<input type="checkbox"/>		21/02/2018	<a href="#">INV416283</a>	Accepted	Invoice	21/02/2018		Adams Office Supplies (US)	

Page size: 10 | Displaying page 1 of 99, items 1 to 10 of 984

DOWNLOAD INVOICE

### Image

Invoice number: 1011  
Transaction number: AAA000150786869

File name	Date saved	Download
AAA000150786869.html	25/04/2018 10:05:37	
AAA000150786869.tif	25/04/2018 10:05:37	
AAA000150786869.pdf	25/04/2018 10:05:39	 

To save the custom report for use at a later time, click “Save as”. You will be prompted to enter the custom name of the report in the specified field. Click “Save” to complete the process.

Welcome Elise

My Account Help & Support Log Out

Adams Office Supplies (IT) - Test Search for your invoice by invoice number, PO, trx number

Home Invoicing My POs Customers Reporting Early payment

### Invoice submitted

Run, view and save reports on the invoices you have submitted

Help with this page

**Criteria**

Select date category: Submission date  
Select date range: All  
Select Tungsten Network accounts: 3 selected  
Select customer: 6 selected  
Select invoice status: 13 selected [Invoice status definitions](#)  
[>> More fields](#)

**Saved report name**

- [Default] Invoices Sent (7 Days)
- [Default] Invoices Sent (This Month)
- Invoices Pending Payment
- Q1 Invoices
- Q1\_Invoices

RUN **SAVE AS** EXPORT RESET

New saved report name

SAVE CANCEL

Invoice number	Invoice status	Invoice type	Submission date	Collection date	Supplier name
	Accepted	Invoice	25/04/2018		Adams Office Supplies (US)

The saved reports can be found on the home page of the Tungsten Network portal. You can also access the saved reports under the “Invoices submitted” and “My reports” pages located under the “Reporting” link in the main menu.

The screenshot shows the Tungsten Network portal home page for Sedgewick & Sons Technologies. The main navigation bar includes Home, Invoicing, My POs, Customers, Reporting, and Early payment. The Reporting menu is expanded, showing options like My reports, Invoices submitted, POs received, Remittances received, 289 bis partner, Tungsten Network billing report, and Dynamic Discount history. Below the navigation, there are sections for 'in a few clicks' with 'CONNECT TODAY' and 'VIEW ALL' buttons, and 'For your attention' with a table of Rejected invoices and Support tickets. At the bottom, there are two tables: 'Rejected invoices' and 'Saved invoices'. The 'Saved invoices' table is highlighted with a red box.

Number	Customer	Date
3456-INV	B&M Manufacturing	05 Oct 2016
inv73632522	B&M Manufacturing	05 Oct 2016
testRosele	B&M Manufacturing	05 Oct 2016
0875-INV	B&M Manufacturing	05 Oct 2016

Number	Buyer	Amount
inv.73262828	AAA168149359	4,442.57
TN123450	AAA168149359	0.00



To export your custom report for use at a later time, click “Export”. Confirm if the report should be exported as an Excel spreadsheet or a CSV flat text file. The system will allow you to open or download the custom report after your selection is made.

The screenshot shows the AOS user interface. At the top left is the AOS logo and the text 'Welcome Elise'. On the right, there are links for 'My Account', 'Help & Support', and 'Log Out'. Below this is a navigation bar with 'Adams Office Supplies (IT) - Test' and a search bar. A secondary navigation bar contains 'Home', 'Invoicing', 'My POs', 'Customers', 'Reporting', and 'Early payment'. The main content area is titled 'My reports' with a subtitle 'Your short cut to viewing and managing the reports you have saved.' and a 'Help with this page' link. A table lists saved reports with columns for 'Saved report name' and 'Submitted invoice'. The first report, '[Default] Invoices Sent (7 Days)', has a dropdown menu open showing 'Export [Default] Invoices Sent (7 Days)'. A red box highlights the 'Export' icon in the action column for this report.

Saved report name	Submitted invoice	Action
[Default] Invoices Sent (7 Days)	Submitted invoice	Export [Default] Invoices Sent (7 Days)
[Default] Invoices Sent (This Month)	Submitted invoice	Export [Default] Invoices Sent (7 Days)
Invoices Pending Payment	Submitted invoice	Export [Default] Invoices Sent (7 Days)
Q1 Invoices	Submitted invoice	Export [Default] Invoices Sent (7 Days)
Q1_Invoices	Submitted invoice	Export [Default] Invoices Sent (7 Days)
Q2 Invoices	Submitted invoice	Export [Default] Invoices Sent (7 Days)
Q3 Invoices	Submitted invoice	Export [Default] Invoices Sent (7 Days)
Q4 Invoice	Submitted invoice	Export [Default] Invoices Sent (7 Days)
Q4 Invoices	Submitted invoice	Export [Default] Invoices Sent (7 Days)

The reporting link in the main menu provides access to other reporting features available to you on the Tungsten Network portal. For example, purchase orders received.

The screenshot shows the Tungsten Network portal interface. At the top, there is a header with the AOS logo, the text 'Welcome Elise', and navigation links for 'My Account', 'Help & Support', and 'Log Out'. Below the header, the user is identified as 'Adams Office Supplies (IT) - Test'. A search bar is present with the placeholder text 'Search for your invoice by invoice number, PO, trx number'. The main navigation menu includes 'Home', 'Invoicing', 'My POs', 'Customers', 'Reporting', and 'Early payment'. The 'Reporting' menu is expanded, showing options: 'My reports', 'Invoices submitted', 'POs received' (highlighted with a red box), 'Remittances received', '289 bis partner', 'Tungsten Network billing report', and 'Dynamic Discount history'. Below the navigation, there are three main content areas: 'Connect with your customers', 'Check the status of your invoices', and a 'For your attention' section. The 'For your attention' section contains a table with one row: 'Failed Invoices' with a count of 1. Below this, there are two sub-sections: 'Failed invoices' and 'Saved invoices', each with a 'View all' link and a table of data.

**Failed Invoices**

Type	Count	Date	Customer
Failed Invoices	1		

**Failed invoices**

Number	Supplier	Buyer
ShuchitestPayment1	Adams Office Supplies (IT) - Test	Tungsten Network - Demo Account

**Saved invoices**

Number	Buyer	Amount
shuchitestPolandinv	AAA168149359	11.90

If your customer utilizes PO services through Tungsten Network, this feature will be available to you. PO services will allow you to utilizes the "PO Convert" function to submit invoices or credit notes to your customer.

**AOS** Welcome Elise ✉ My Account Help & Support Log Out

Adams Office Supplies (IT) - Test Search for your invoice by invoice number, PO, trx number

Home Invoicing **My POs** Customers Reporting Early payment

### POs received

View, save and run reports on the purchase orders you have received. [Help with this page](#)

**Criteria**

Select PO date	PO number
Last 30 days	
Select Tungsten Network accounts	Select report content <span>?</span>
Adams Office Supplies (IT) - Test - DE999999	10 selected
Customer Name	PO status
8 selected	8 selected

**Saved report name** ?

No records found.

**RUN** **SAVE AS** **EXPORT** **RESET**

If your customer does not have PO services, you must use the “Create invoice” feature located under “Invoicing” in the main menu. For more information on PO convert or standard electronic invoicing, please visit our Help and Support link to view our helpful How to tutorials. Suppliers using our Integrated Solution may have access to view purchase order under “My POs” available in the main menu.

The screenshot displays the AOS web application interface. At the top left, the AOS logo is visible next to the text "Welcome Elise". On the top right, there are links for "My Account", "Help & Support" (highlighted with a red box), and "Log Out". Below this is a search bar with the placeholder text "Search for your invoice by invoice number, PO, trx number". A navigation bar contains several menu items: "Home", "Invoicing" (highlighted with a red box), "My POs", "Customers", "Reporting", and "Early payment". A dropdown menu is open under "Invoicing", with "Create invoice" (highlighted with a red box) as the selected option. Other options in the dropdown include "Template management", "Invoice status", and "Purchase Tungsten Network transactions". Below the navigation bar, the main content area shows a section for "POs received" with a sub-section for "Criteria" titled "Purchase Tungsten Network transactions". This section contains several search filters: "Select PO date" (Last 30 days), "Select Tungsten Network accounts" (Adams Office Supplies (IT) - Test - DE999999), "Customer Name" (8 selected), "PO number" (empty field), "Select report content" (10 selected), and "PO status" (8 selected). At the bottom of this section are four buttons: "RUN" (green), "SAVE AS" (blue), "EXPORT" (blue), and "RESET" (grey). On the right side of the page, there is a "Saved report name" section with a question mark icon and the text "No records found." Below this is a "Help with this page" link.

You also have access to view or download Tungsten Network billing reports. The billing report provides details related to invoices submitted to you by Tungsten Network.

The last feature available under “Reporting” gives you access to Tungsten Early Payment history. If early payments are taken through Tungsten Bank, you can track these transactions from the Tungsten portal.

Using the reporting features via Tungsten Network is very easy. You are encouraged to use the "Help & Support" page if you need assistance navigating the Tungsten Network portal or are experiencing a technical issue using the site.

The screenshot shows the Tungsten Network portal interface. At the top, there is a header with the AOS logo, 'Welcome Elise', and navigation links for 'My Account', 'Help & Support', and 'Log Out'. Below the header, the user's account name 'Adams Office Supplies (IT) - Test' is displayed, along with a search bar for invoices. The main navigation menu includes 'Home', 'Invoicing', 'My POs', 'Customers', 'Reporting', and 'Early payment'. The 'Reporting' menu is expanded, showing options like 'My reports', 'Invoices submitted', 'POs received', 'Remittances received', '289 bis partner', 'Tungsten Network billing report' (highlighted with a red box), and 'Dynamic Discount history'. Below the navigation, there are three main sections: 'Connect with your customers', 'Check the status of your invoices', and 'For your attention'. The 'For your attention' section contains a table with one row: 'Failed invoices' with a count of 1. Below this, there are two tables: 'Failed invoices' and 'Saved invoices'. The 'Failed invoices' table has columns for Number, Supplier, and Buyer, with one entry: 'ShuchitestPayment1' from 'Adams Office Supplies (IT) - Test' to 'Tungsten Network - Demo Account'. The 'Saved invoices' table has columns for Number, Buyer, and Amount, with one entry: 'shuchitestPolandInv' from 'AAA168149359' for an amount of 11.90.



For more information,  
and to view more  
videos, please visit the  
Help & Support section