

Custom Reports Factsheet #3 for Business Contract Manager and Business Financial Manager:

Display all organisations & individuals supported and/or engaged with

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Business Financial Managers (BFM) are in charge of the financials of a group. They can view all Activity Agreements and complete and/or submit Financial Reports. Business Contract Managers (BCM) are in charge of the contracts with investors and investees.

Date: May 12 Audience: BCM & BFM

Follow instructions below to display all organisations & individuals your Group have supported and/or engaged with.

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	Home · Portfolios Activity Agreements · Delivery Areas · Projects · Pla	ns Custom Reports 💌	sse	
>>	Happiness is a how, not a what; a talent, not an object Hermann Hesse	Create	click repo Create Create a new custom r	
	Projects	Single-click reports	Create a new custom r	epor

Log in to your enQuire account, and select the dropdown arrow next to **Custom Reports** in primary navigation, and then **Create**.

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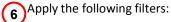
enQuire helpdesk +61 (7) 3846 1555 admin@enquire.net.au Custom Report Factsheet#3 for BCM to display all Organisations & Individuals supported and/or engaged with

Project Delivery Agent Name



🕕 Totals Row 🕕 Null Only 🕕 No Repeat

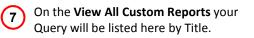
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a) Select the No repeat checkbox for **Delivery Agent Name** so the data only displays once oject Status oject Status oject Status Active Barked Completed

No Repeat data checkbox

Select the **Save** button at the bottom of the page.



Select the drop-down arrow next to the Custom Report name and then **Generate**.

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Your Custom Report may take a minute to Generate.

Once the screen has loaded again, select the arrow pointing to the Custom Report Title, which will list the Generated reports beneath.

Select the drop-down arrow and then **Download**.

Your report will now open in an Excel workbook.