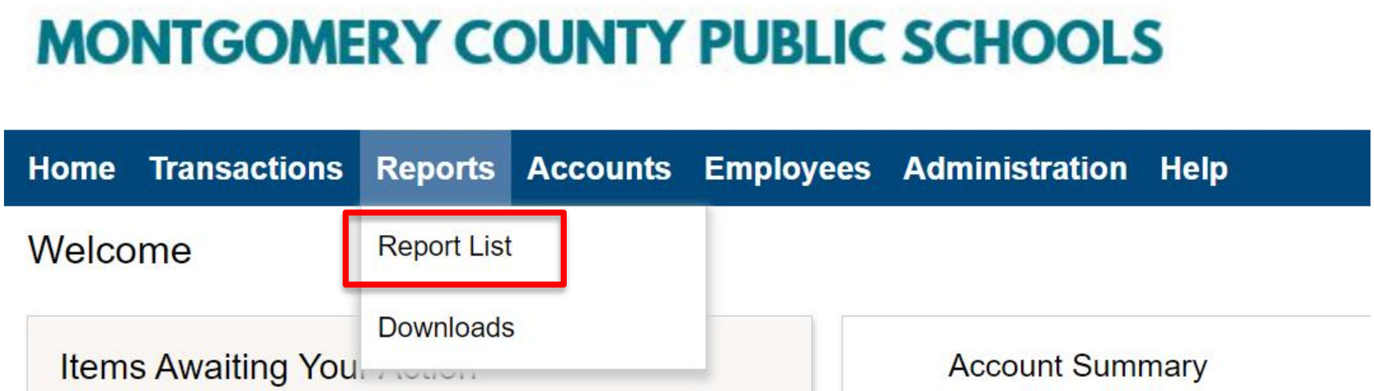
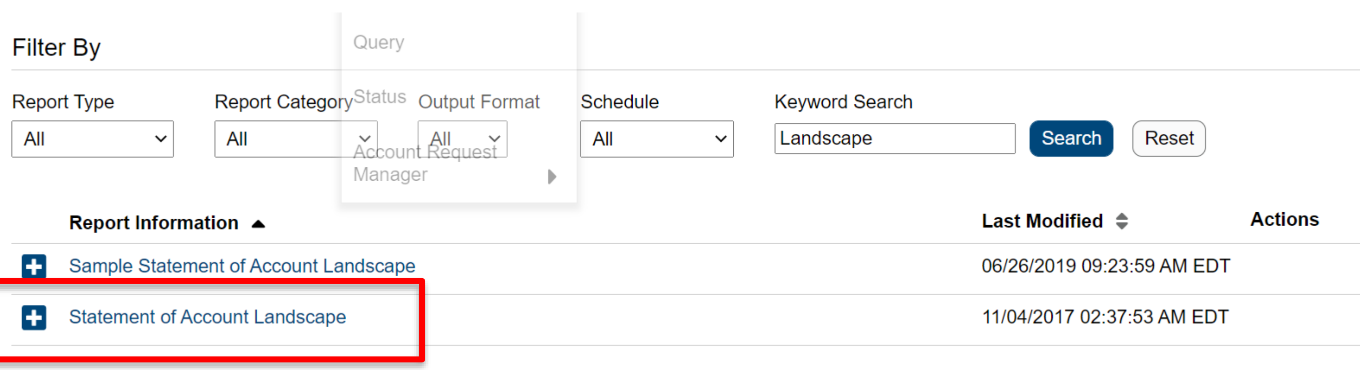
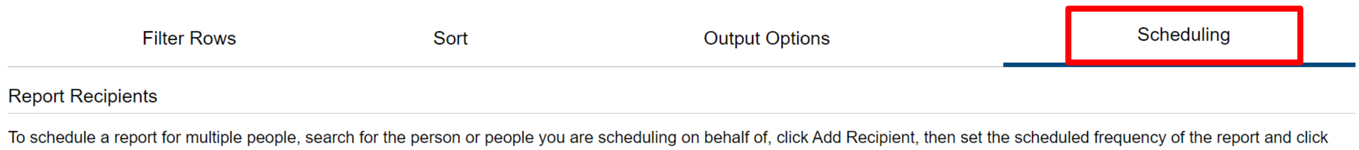
In this topic, you will learn how to schedule your Statement of Account Landscape Report and/or change report parameters as needed

Step	Directions
1	Within the dashboard, hover over **Reports** and Select **Report List** 
2	Select the **Statement of Account Landscape** or Search in search bar for "**Landscape**." **If you are modifying your existing report, select the report you previously created with your name or identifying information in the title* 

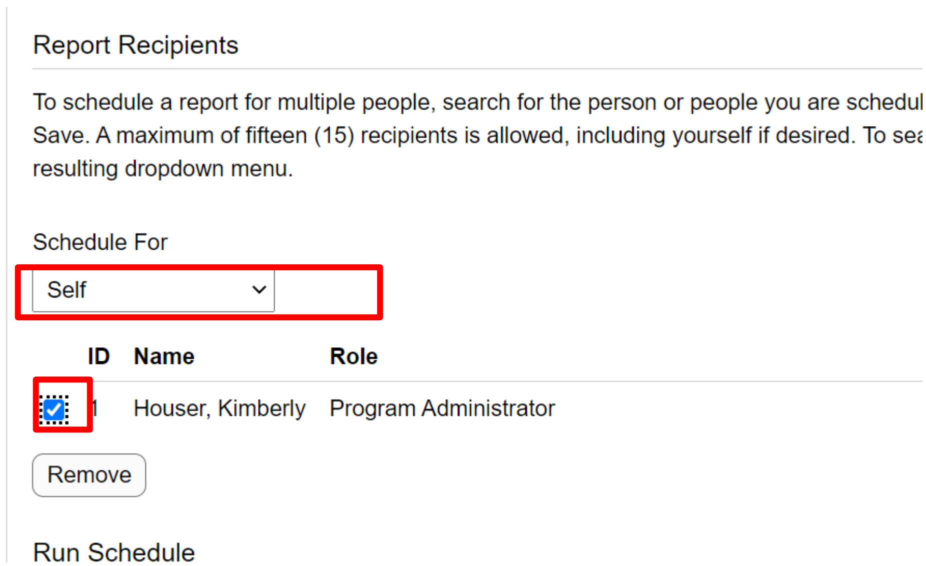
3

Select the **Scheduling** Option **Skip this step if you are not scheduling your report to run monthly*

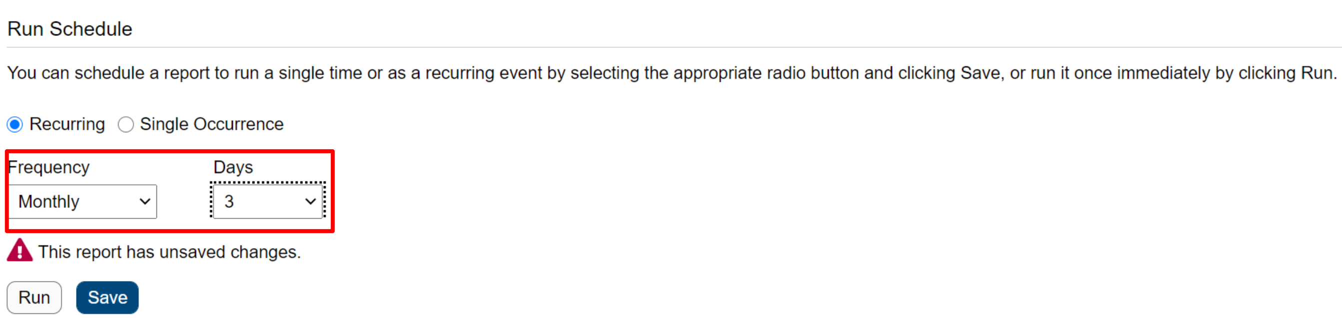


4

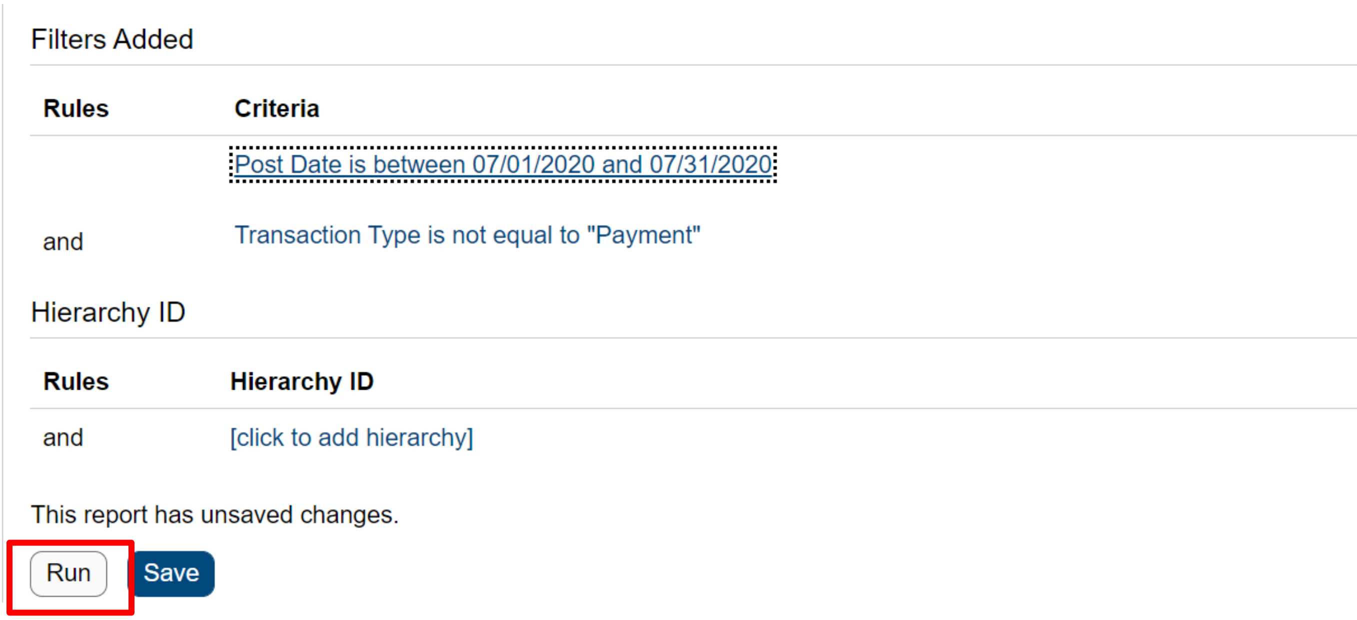
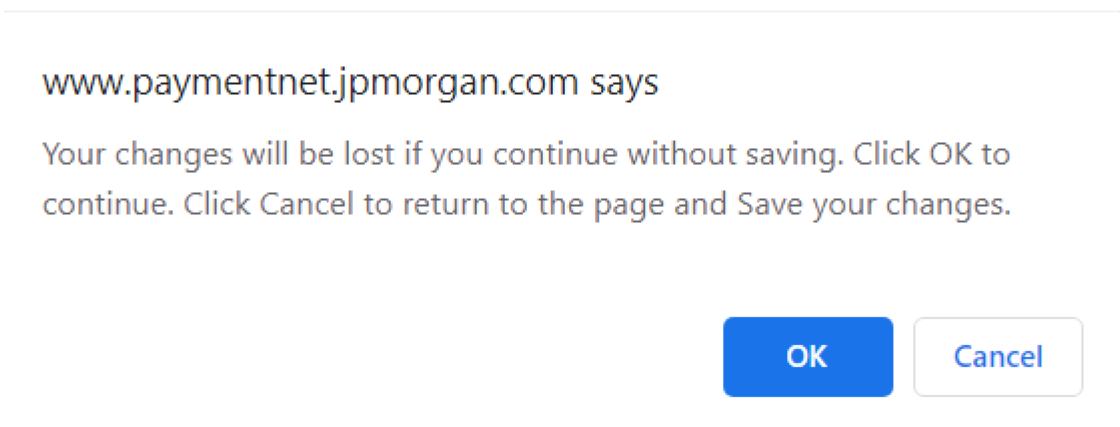
In the **Report Recipients Section**, Select "**self**" from the drop down under "**Schedule For**" and check the box next to your name

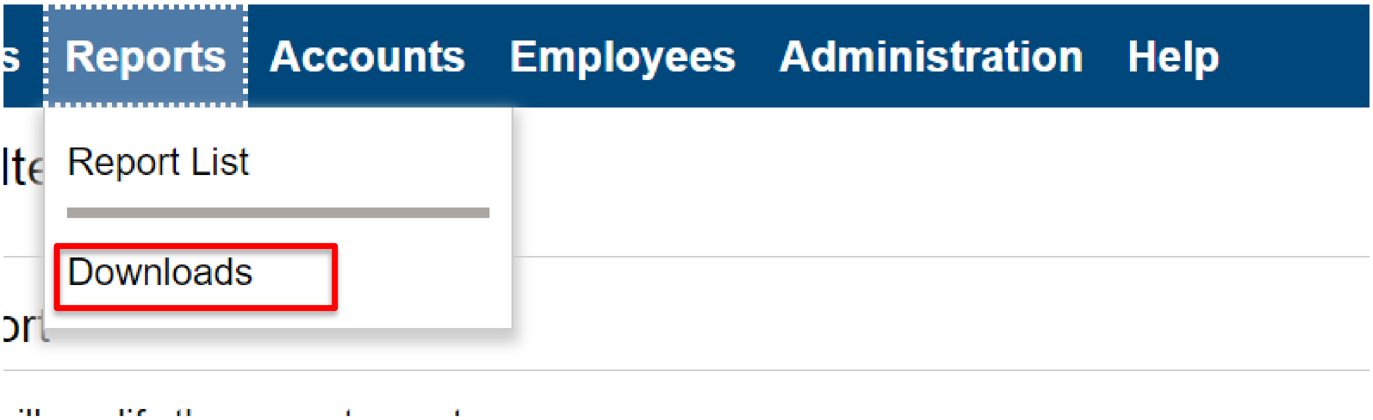


In the **Run Schedule** select Monthly and **3**. You can click Run to run the report immediately or **Save** and the report will run automatically on the 3rd day of each month.



5	**Optional**: to change the parameters of the report for a custom one-time report, Go to the **Filter Rows** tab Filter Rows Sort Output Options Scheduling Add and order the filter expressions to include in your report. Click filter links to edit a filter. To use a field in a filter it must have been added. Some fields may not be available for use in filter. Note: When reporting transaction data, you must filter on Post Date. Filters Added
5a	Click: **Post Date is in the Last Month** **Rules** **Criteria** Post Date is in Last Month and Transaction Type is not equal to "Payment" Hierarchy ID
5b	Select the necessary option. Note that the options, when selected populate additional fields. To create a report by a date range, for example, select **Is Between** and enter the **Start Date** and **End Date** you wish to be displayed in the report Select a report field to filter on. Not all fields are available to use for filtering. Then select an operator and specify the appropria Required Fields* Field to Filter On * Operation Start Date* and End Date* Post Date Is Between MM/DD/YYYY MM/DD/YYYY Is Between Cycle Is Is Relative Is Equal To Preview Filter Expr Post Date is between and

5c	Once you have selected your desired options, click **Run**. ***Important:** Do not save – this is a one-time option  If you see this pop-up, click **OK** 

6	To view your report, go back to the main tab, hover over **Reports** and select **Downloads**. It may take your report several minutes after submitting to indicate Successful. Once it indicates successful, you can click on the report name and open the zip file. 
7	To receive a notification when a scheduled report has been completed or to receive email notifications when transactions are ready for your review, click **My Profile** (top right)  You can check the boxes and Save your choices as needed