

How to edit a report

It is only possible to edit the name on the web page of a report, add notes and set the report as "posted" or as "Favorite" (see image below). For accounting security reasons, the reports are not updated, but are generated and saved without the possibility of correction.

However, you can easily delete a report that has gone wrong and generate it again.

Usually, reports are generated several times during onboarding as you often want to adjust selections, add agreements you missed, etc. but once you have used a report in accounting, you should not adjust "backwards" in time. If you need to adjust possibly incorrect or missing agreements, you do so in the next period.

Screenshot

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