

How to use the CIS Activity Summary

To get to the Activity Summary management report, click on the **Management Reports** link under the **Tools** section, from the main screen on the CIS website:



On the Management Reports screen, select **Activity Summary**, which will offer a complete detail of your branch/company transactions for any given period:

The screenshot shows the 'Management Reports' form. Under 'Account Activity', 'Activity Summary' is selected and circled in red. Under 'Quality Control', 'Fraud Alerts Triggered' is selected. The 'Options' section includes date pickers for 'From' (05/01/2019) and 'To' (05/31/2019), with 'Download CSV Report' circled in red. The 'Filter By' section has 'User' selected. The 'Show subtotals' section has 'None' selected. The 'View Summary only' checkbox is circled in red. At the bottom, the 'View Report' button is highlighted with a red arrow.

Complete the report options you require, including dates, filters and how to show subtotals:

- **View summary only:** select to hide individual transactions
- **Combine credit file charges:** combines multiple charges on a single file into one entry
- **Group by department:** option not available if you filter by Team or Account

To view the web report format, select **View Report**. To view the CSV format, select **Download CSV Report**. Sample Activity Summary report:

Reporting period 4/1/2019 to 4/30/2019					
Product	Description	Count	Charge	Credit	Amount
BUS_CREDIT	BUSINESS CREDIT REPORT	6	\$0.00	\$0.00	\$0.00
EXP/EQF/TUC	EXP/EQF/TUC INDIVIDUAL	27	\$540.00	\$0.00	\$540.00
EXP/EQF/TUC/JNT	EXP/EQF/TUC JOINT	9	\$360.00	\$0.00	\$360.00
LIENS AND JUDGMENTS REPORT	LIENS AND JUDGMENTS REPORT	48	\$0.00	\$0.00	\$0.00
REFRESH	REFRESH REPORT	1	\$20.00	\$0.00	\$20.00
RMCR	RMCR	8	\$590.00	\$200.00	\$390.00
TUC	TUC INDIVIDUAL	6	\$0.00	\$0.00	\$0.00
WHAT-IF	WHAT-IF SIMULATOR	3	\$0.00	\$0.00	\$0.00
COMPARISON REPORT	Custom Charge	1	\$2.50	\$0.00	\$2.50
Overall Summary Total		109	\$1,512.50	\$200.00	\$1,312.50