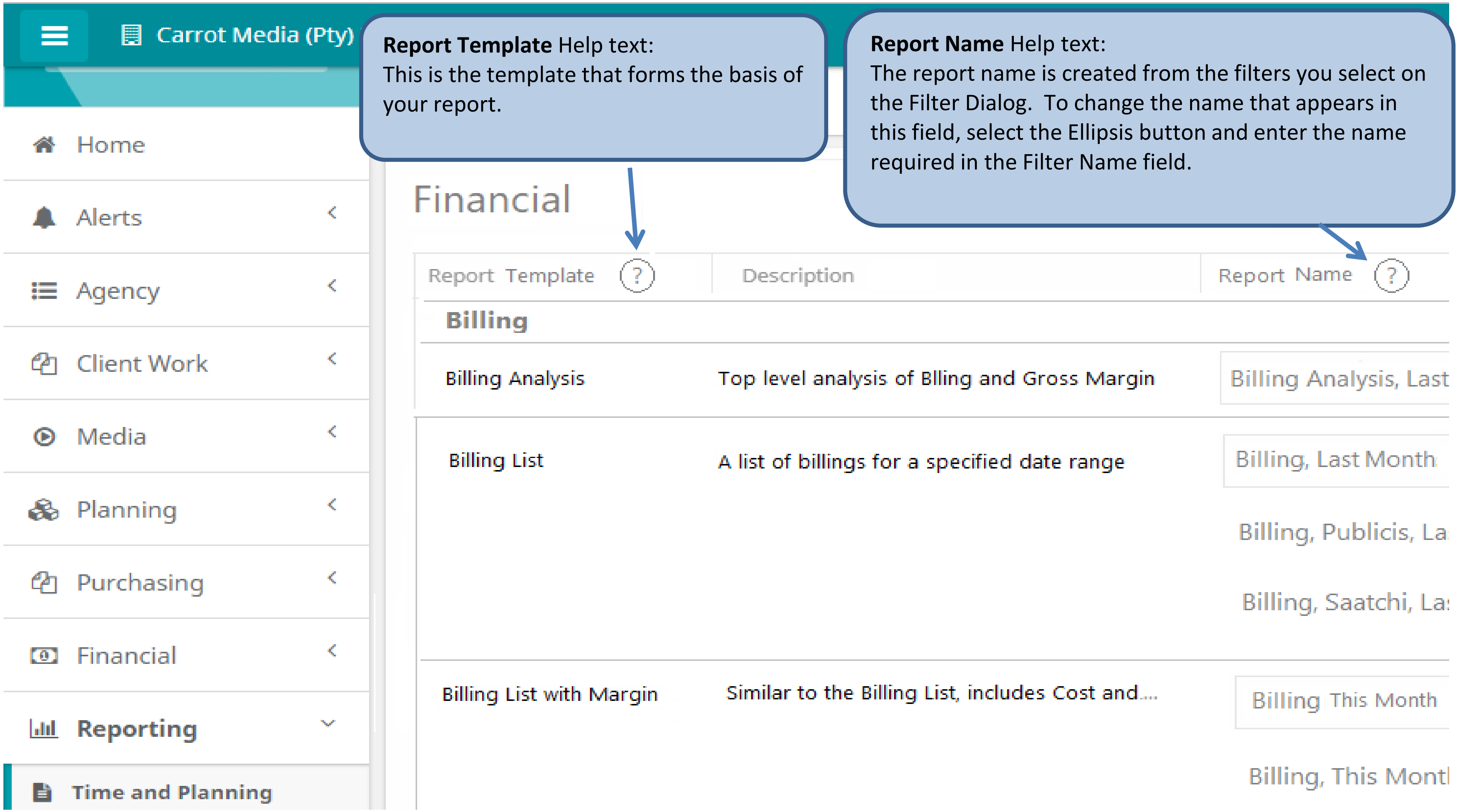
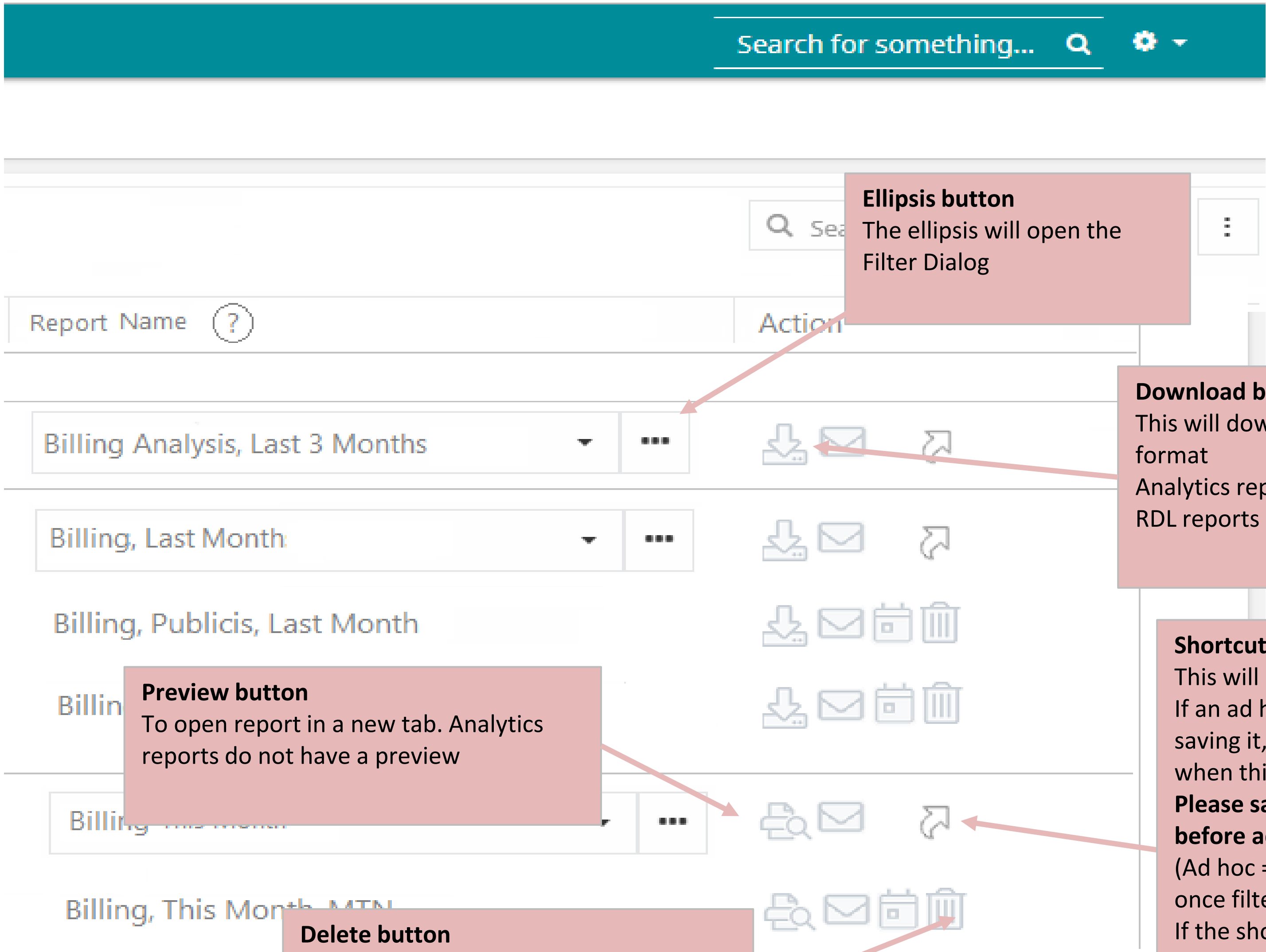
Sheet	Change	Row	Date	Changed By
Reports List	Ad hoc functionality for the shortcut button, and message	Shortcut button text box	04-Apr-19	Natalie
	Updated Report Name help text	Report Name Help text text box	09-Apr-19	Natalie
	Shortcut button error message if it already exists	Shortcut button text box	12-Apr-19	
Delete shortcut			03-Apr-19	Natalie
Filter Dialog	Updated Filter Name help text, added a Company field	Filter Name Help text text box, Company text box	09-Apr-19	Natalie
Save As Filter	Added detail/message about Shared filters, added For Company field	Type, OK and For Company text boxes, For Company Help text	10-Apr-19	Natalie
Shortcuts List			03-Apr-19	Natalie

Legend

Help Text	Blue text boxes
Developer notes	Pink text boxes


Carrot Media (Pty)
Report Template Help text:
This is the template that forms the basis of your report.
Report Name Help text:
The report name is created from the filters you select on the Filter Dialog. To change the name that appears in this field, select the Ellipsis button and enter the name required in the Filter Name field.
Home
Alerts
Agency
Client Work
Media
Planning
Purchasing
Financial
Reporting
Time and Planning
Financial
Report Template
Description
Report Name
Billing
Billing Analysis
Top level analysis of Blling and Gross Margin
Billing Analysis, Last
Billing List
A list of billings for a specified date range
Billing, Last Month
Billing, Publicis, La
Billing, Saatchi, La:
Billing List with Margin
Similar to the Billing List, includes Cost and....
Billing This Month
Billing, This Montl



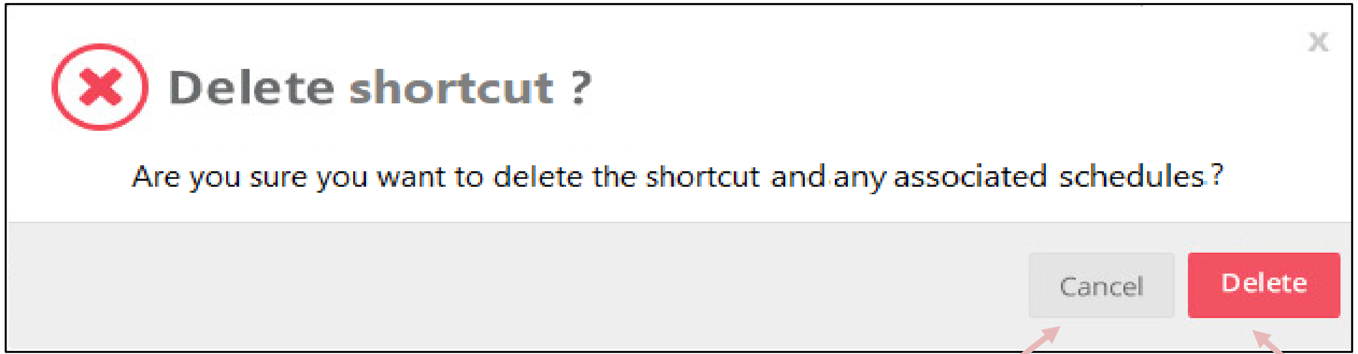
Ellipsis button
The ellipsis will open the Filter Dialog

Download button
This will download the report in the default format
Analytics reports will download in Excel
RDL reports will download in PDF

Preview button
To open report in a new tab. Analytics reports do not have a preview

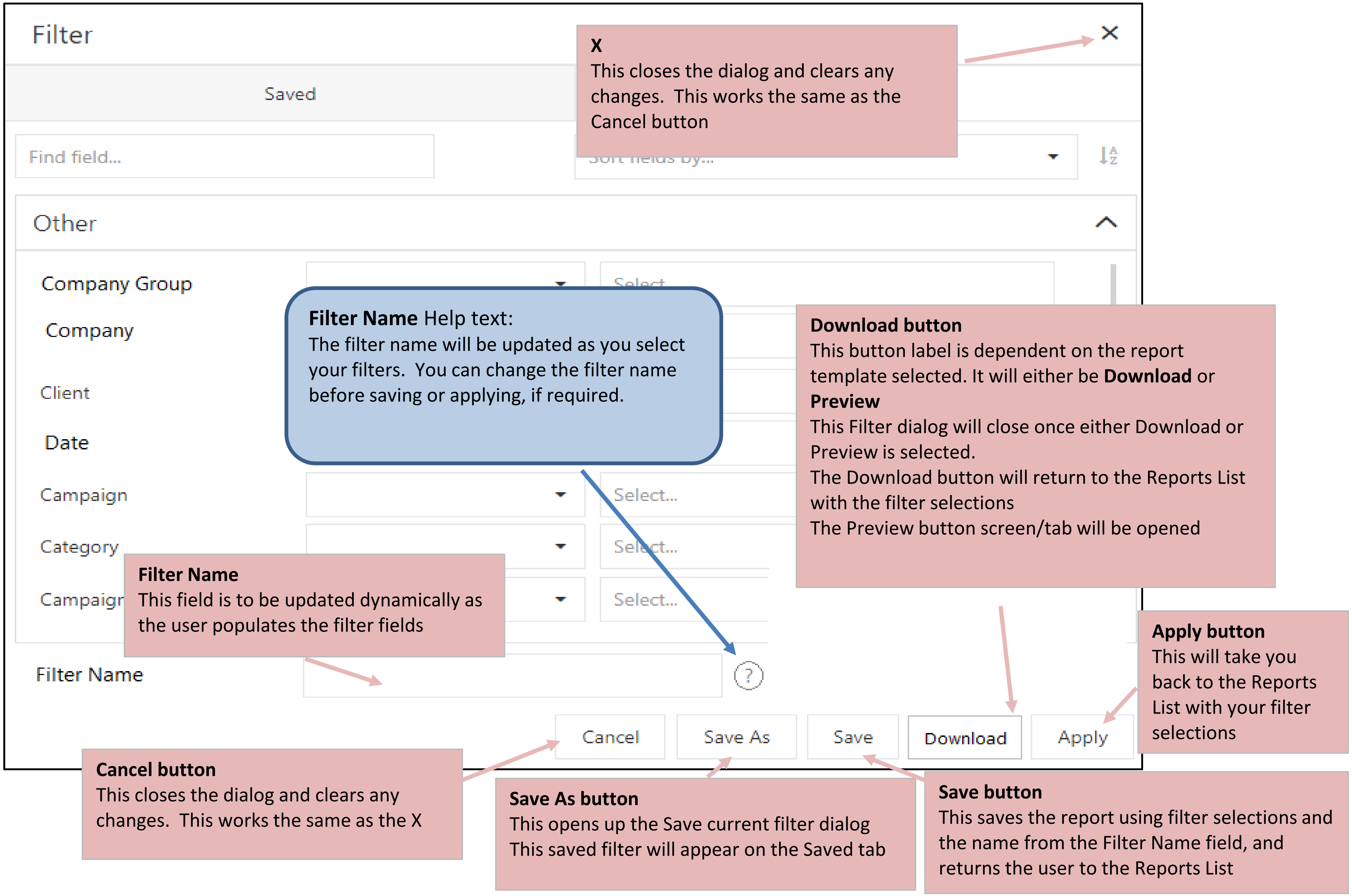
Shortcut button
This will add the report to the shortcut list
If an ad hoc filter was applied without first saving it, the following message is to appear when this Shortcut button is selected:
Please save this as a personal or shared filter before adding it as a shortcut
(Ad hoc = Apply is selected on the Filter Dialog once filters have been chosen)
If the shortcut already exists, the following error message is to appear:
This Shortcut already exists. Save this report with a different name and try again.

Delete button
This will remove the report from the list once the user has confirmed that they are sure they want to delete it (see Delete shortcut tab)



Cancel button
Close this dialog and return to the Reports List

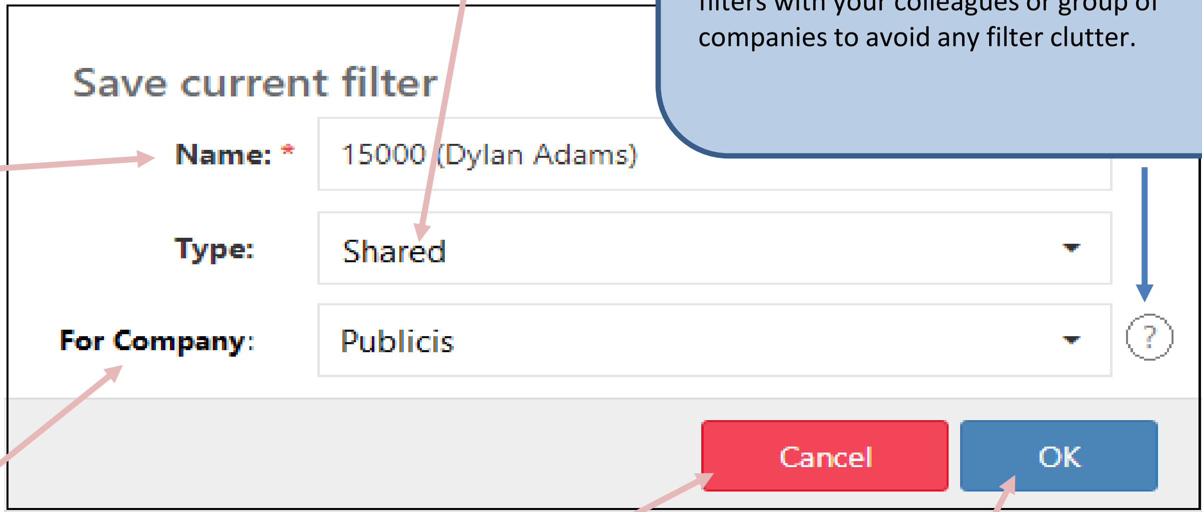
Delete button
Remove the shortcut from the list, close this dialog and return to the Reports List


Filter
Saved
Find field...
Sort fields by...
Other
Company Group
Select...
Company
Client
Date
Campaign
Select...
Category
Select...
Campaign
Select...
Filter Name
Cancel
Save As
Save
Download
Apply
X
This closes the dialog and clears any changes. This works the same as the Cancel button
Filter Name Help text:
The filter name will be updated as you select your filters. You can change the filter name before saving or applying, if required.
Download button
This button label is dependent on the report template selected. It will either be Download or Preview
This Filter dialog will close once either Download or Preview is selected.
The Download button will return to the Reports List with the filter selections
The Preview button screen/tab will be opened
Filter Name
This field is to be updated dynamically as the user populates the filter fields
Apply button
This will take you back to the Reports List with your filter selections
Cancel button
This closes the dialog and clears any changes. This works the same as the X
Save As button
This opens up the Save current filter dialog
This saved filter will appear on the Saved tab
Save button
This saves the report using filter selections and the name from the Filter Name field, and returns the user to the Reports List

Type
User can select either Personal or Shared

For Company Help text:
Select the company to which you want to share this filter.
This field defaults to the company you have permissions to share.
We recommend you only share essential filters with your colleagues or group of companies to avoid any filter clutter.

Name
This field is populated with the text from the Filter Name field
If this name is changed, it is to reflect in the Filter Name field on the Filter dialog
If the name already exists, a message will appear (to be discussed)



For Company
The For Company field should appear when Shared is selected in the Type field, and only if there is more than one company in the organisation

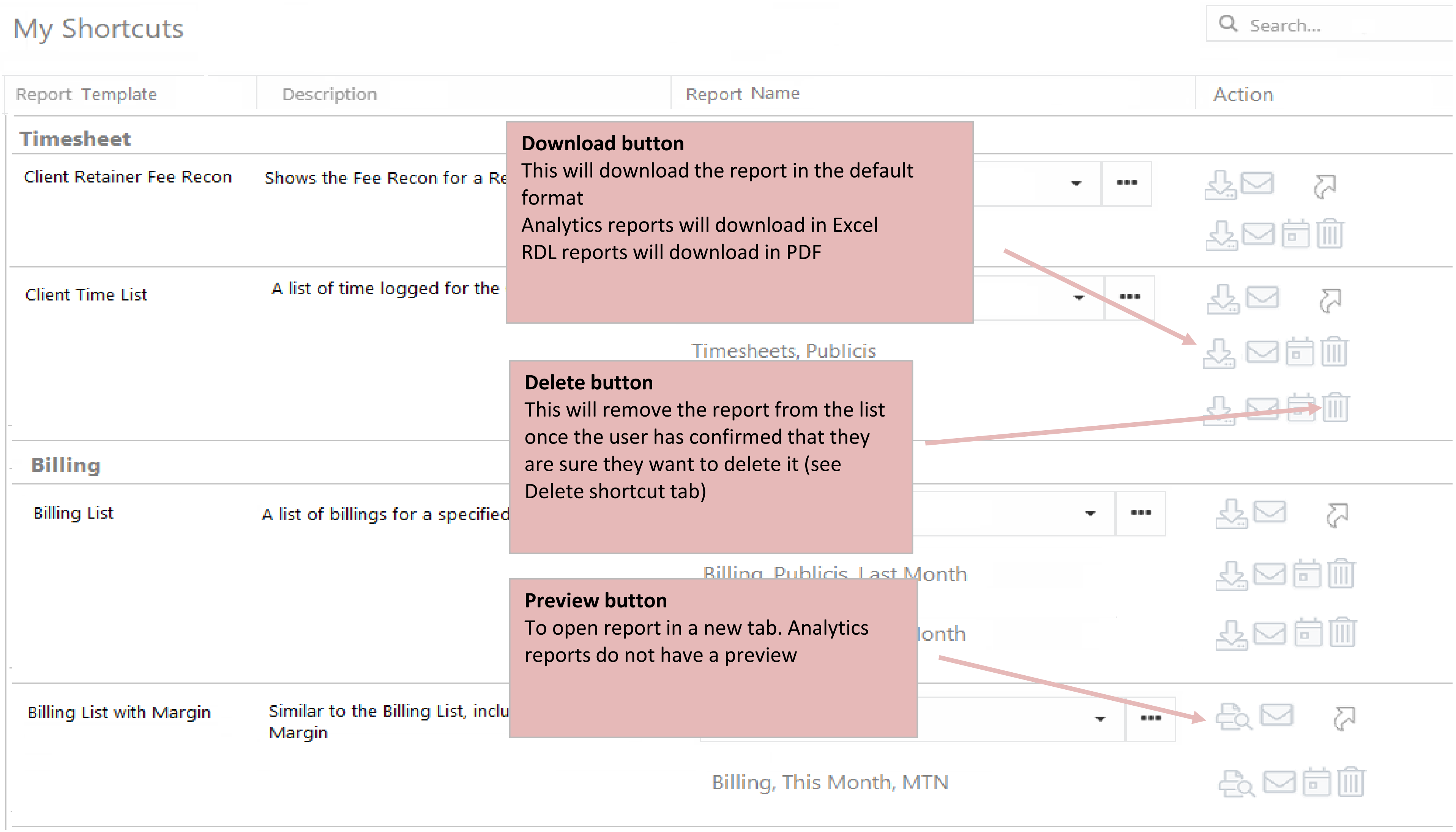
If a Shared filter is selected, it will be applied to all companies the user has access to, unless otherwise specified

This field will default to the company defined in the Company Access field on the Employee Setup

Cancel
This closes the dialog and returns the user to the Report Filter dialog

OK
This returns the user to the Reports List once the changes have been made

When changing a Shared filter, the following message will appear:
This filter was created by {}, are you sure you want to overwrite it?


My Shortcuts
Search...
Report Template
Description
Report Name
Action
Timesheet
Client Retainer Fee Recon
Shows the Fee Recon for a Re
Download button
This will download the report in the default format
Analytics reports will download in Excel
RDL reports will download in PDF
Client Time List
A list of time logged for the
Timesheets, Publicis
Delete button
This will remove the report from the list once the user has confirmed that they are sure they want to delete it (see Delete shortcut tab)
Billing
Billing List
A list of billings for a specified
Billing, Publicis, Last Month
Preview button
To open report in a new tab. Analytics reports do not have a preview
Billing List with Margin
Similar to the Billing List, inclu
Margin
Billing, This Month, MTN