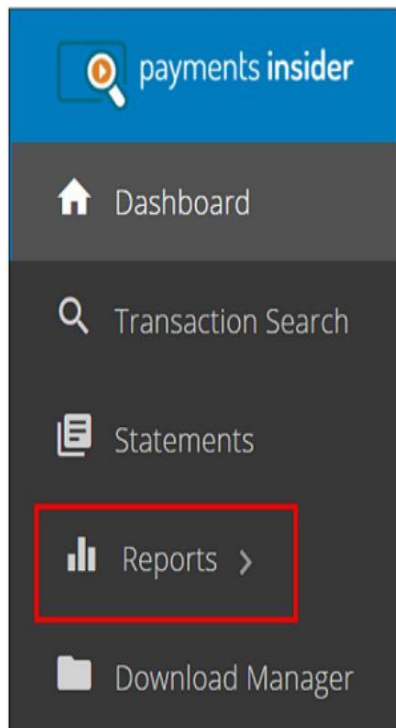


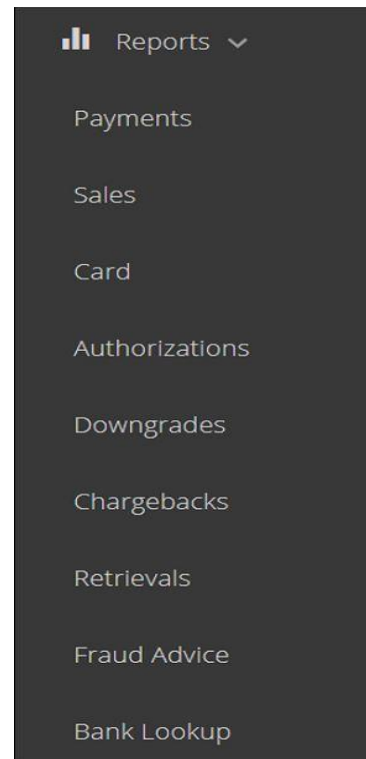
# How to Create Reports on Payments Insider

Payments Insider has a variety of reporting options available. If you want to generate a report, please follow the instructions below.

**On the left side menu, click Reports**



**Click on the report type you would like to view.**



- **Payments:** Displays activity we have sent to your bank account (batches, billing, etc.).
- **Sales:** Displays transactions for the selected date range.
- **Card:** Displays transactions grouped by card brand.
- **Authorizations:** Displays authorized transactions (whether they have been settled or not).
- **Downgrades:** Displays transactions that didn't qualify for the best rate. Visit [What is Interchange? \(/s/article/What-is-Interchange\)](/s/article/What-is-Interchange/) if you want to learn more about downgrades.
- **Chargebacks:** Displays disputed transaction information. Visit [How to View and Respond to Chargeback Disputes in Payments Insider \(/s/article/How-to-View-andRespond-to-Chargeback-Disputes-in-Payments-Insider\)](/s/article/How-to-View-andRespond-to-Chargeback-Disputes-in-Payments-Insider/) for more information about this report type.
- **Retrievals:** Displays requests for receipts.

- **Fraud Advice:** Displays any Fraud Advice messages you have received in the selected time period.
- **Bank Lookup:** Provides you with information about a specific bank (first 6 digits of the card number required)

Customize the report to the date range and criteria you want to see. Click Show Results to display your report.

Customize the report to the date range and criteria you want to see. Click Show Results to display your report.

**Payment Summary Report** ? ★ BOOKMARKED REPORTS

Contains funded activity for reconciling to your bank account.



Location \* ▼ Payment Date Last 24 Hours ▼ From Date \* 08/18/2024 ▼ To Date \* 08/19/2024 ▼



Required

Tip: If you have a large number of locations, you can create a location group to make sorting your information easier. Visit [Using Location Groups in Payments Insider](#) to get started.

The report results will display below and will usually be broken out into sections relevant to the kind of report you requested.

There will be different options available on some of these report sections. Note: not all report types or sections will offer all of these options.

Description	Icon/Image
<p><b>Print Button:</b> If a Print icon is displayed, this report can be printed out.</p>	
<p><b>Toggle Options:</b> If you have buttons like these, it means there is more than one way to view this report. You can use these buttons to switch between them. The option you're currently viewing has a blue background and any other options that are available have a white background.</p>	

<p><b>Settings button:</b> This means there are ways the report can be filtered or customized. Clicking this will usually bring up a menu with filter settings that are relevant to this report.</p>	
<p><b>Export:</b> You can click "Export" to download a copy of this report. Note that this is located at the top of the page where you generate the report next to the "Show Results" button, not in the individual report sections.</p>	

If you want to bookmark the filters you have set up for your report so you can easily access it again later, visit [How to Bookmark and Schedule Reports in Payments Insider](#).