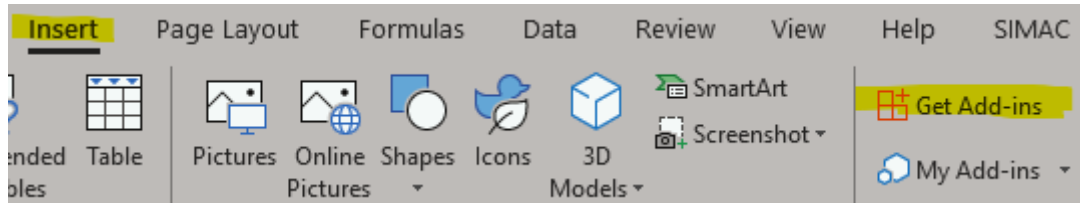


Readsoft Online – Rapportages genereren in Excel

Het is mogelijk om in Excel met behulp van een add-in rapportages te genereren over facturen die in Readsoft Online zijn verwerkt.

Deze add-in is in Excel toe te voegen via: Insert – Get Add-ins:



Hier kan vervolgens worden gezocht op Readsoft. Klik vervolgens naast "Readsoft Online Reports" klikken "Add".

Office Add-ins

MY ADD-INS | ADMIN MANAGED | STORE

Add-ins may access personal and document information. By using an add-in, you agree to its Permissions, License Terms and Privacy Policy.

readsoft

Suggested for you

Category

All

CRM

Data Analytics

Document Review

Editor's Picks

Education

Financial Management



ReadSoft Online Data Import

ReadSoft Online Data Import, allows you to easily upload master data to ReadSoft Online from Excel.

May require additional purchase

★★★★★

Add



ReadSoft Online Reports

Easily generate Excel reports of your ReadSoft Online documents.

★★★★★

Add

Vervolgens verschijnt de add-in aan de rechterkant van het scherm in Excel. Vul de URL in waarmee wordt ingelogd op de admin portal (bijvoorbeeld: <https://simac.readsoftonline.com/>). Vul ook de username en het password in. Daaronder kan worden aangegeven welke rapportages gegenereerd moeten te worden en over welke periode.

De add-in blijft overigens bestaan in Excel en kan later weer worden geopend via My Add-ins.

De tabbladen worden gegenereerd in het Excel bestand dat op dat moment openstaat, het is dus handig om dan eerst met een leeg Excel bestand te beginnen alvorens de add-in te openen.

De add-in zoals die wordt getoond in Excel:

ReadSoft Online Reports

ReadSoft Online

ReadSoft Online Reports for Excel, is used to create various reports of your ReadSoft Online documents in an easy way. You can also use the downloaded data to create custom reports and graphs, which can be updated at any time.

Log in as an administrator and click **Generate** to create the selected reports.

Administrator user name

Password

Reports

Invoice aging

Pending invoices

Data sets

Document details

Document details history

Successfully processed time interval

From: To:

Document process status

Document process status history

Successfully processed time interval

From: To:

Document consumption details

Successfully processed time interval

From: To: