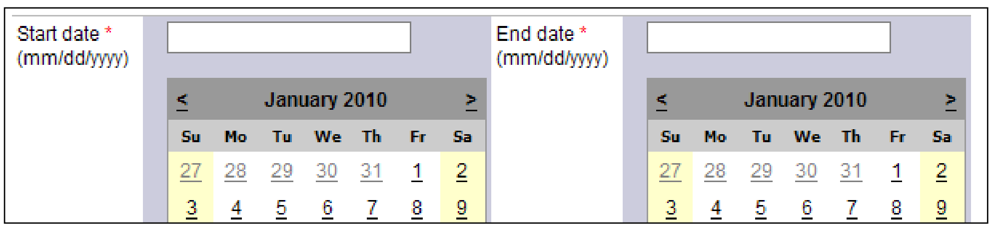
Quick Tip 9 - Running a Balance Report

This reference will show you how to run a balance report to view your Unit account balance. For additional information about the Unit Balance Report, refer to *Quick Tip 10 – Understanding the Balance Report*.

Step 1: Hover your cursor over **Reports** and click on **Balance**.

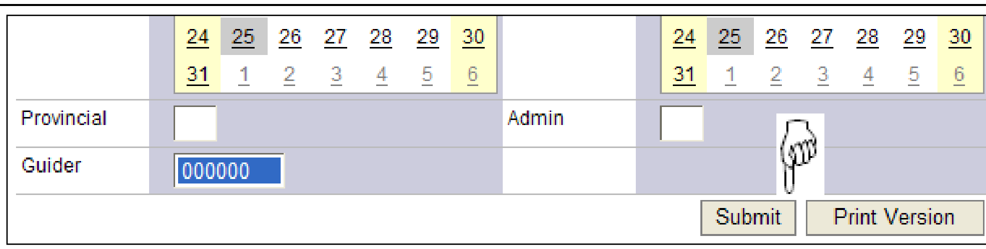
Step 2: You can either type in the date (format: mm/dd/yyyy) or click the dates on the calendars.

The default date **Start date is 09/01/20XX but you may choose a different start date.** However, you must choose an **End date**. The start date cannot be the same as the end date. To get an up-to-date report that captures all revenues and expenses, set the **End date** as the current date.



Step 3: Click the **Submit** button to view the report below the calendars or click the **Print Version** button to open up a printer-friendly version of the report.

TIP: If you click **Print Version** but your report does not appear, check your internet browser to ensure that you have allowed pop-up windows or tabs. After you have allowed pop-ups, you will need to click **Print Version** again.



Step 4: Your report will look something like this: