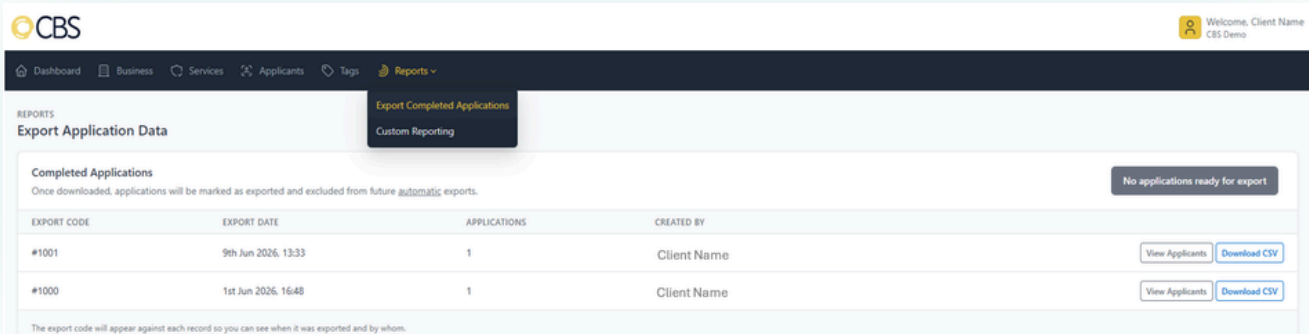




Client Guide: Reports

Reports - Completed Applications

The Reports page allows you to export completed application data as a CSV file.



The screenshot shows the CBS Reports page. The top navigation bar includes links for Dashboard, Business, Services, Applicants, Tags, and Reports. The Reports section is active, showing 'Export Completed Applications' and 'Custom Reporting' options. Below this, there's a section titled 'Completed Applications' with a note: 'Once downloaded, applications will be marked as exported and excluded from future automatic exports.' A table displays application data with columns: EXPORT CODE, EXPORT DATE, APPLICATIONS, and CREATED BY. Two rows are shown: one with EXPORT CODE #1001, EXPORT DATE 9th Jun 2026, 13:33, APPLICATIONS 1, and CREATED BY Client Name; the other with EXPORT CODE #1000, EXPORT DATE 1st Jun 2026, 16:48, APPLICATIONS 1, and CREATED BY Client Name. Each row has 'View Applicants' and 'Download CSV' buttons. A status message at the top right says 'No applications ready for export'.

EXPORT CODE	EXPORT DATE	APPLICATIONS	CREATED BY
#1001	9th Jun 2026, 13:33	1	Client Name
#1000	1st Jun 2026, 16:48	1	Client Name

Here you can see how many completed applications have not been downloaded and exported yet. This will be displayed as:

78 applications ready for export

OR

No applications ready for export

To export completed applications, simply click the green button and an export will appear on the page for you to view applicants and download a CSV File containing all applications that have recently completed.

Any exports will stay on this section for you to access at a future date.

Click [Download CSV](#) to re-download a copy of previous reports.

To view the applications included in each report, click [View Applicants](#)

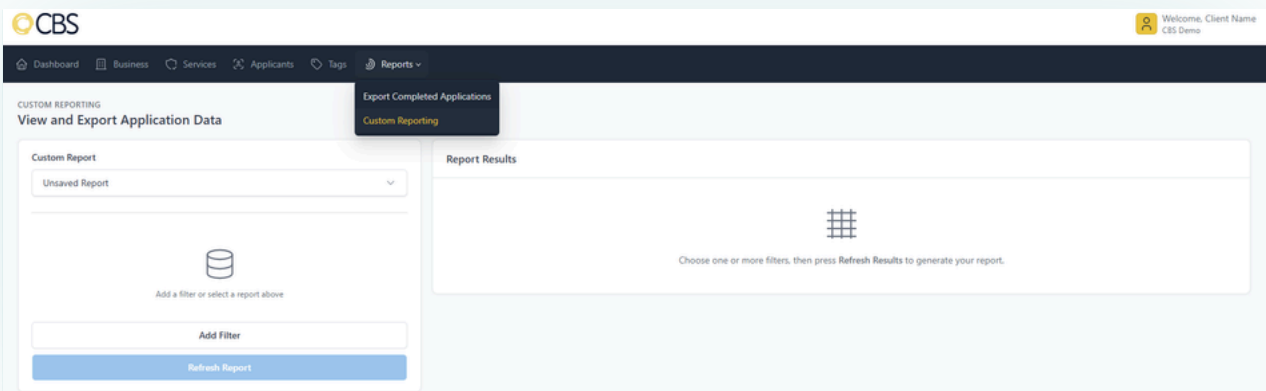
The completed application reports include:

- Organisation Name
- Package Name and Details
- Applicant Job Title
- Applicants Personal Details (Name, DOB, Address, Email Address)
- Application Start Date
- Application Status
- Completion Date and Result (E-Reference Number and Disclosure Number)
- CBS Reference Number / Export Reference Number
- Custom Fields



Reports - Custom Reporting

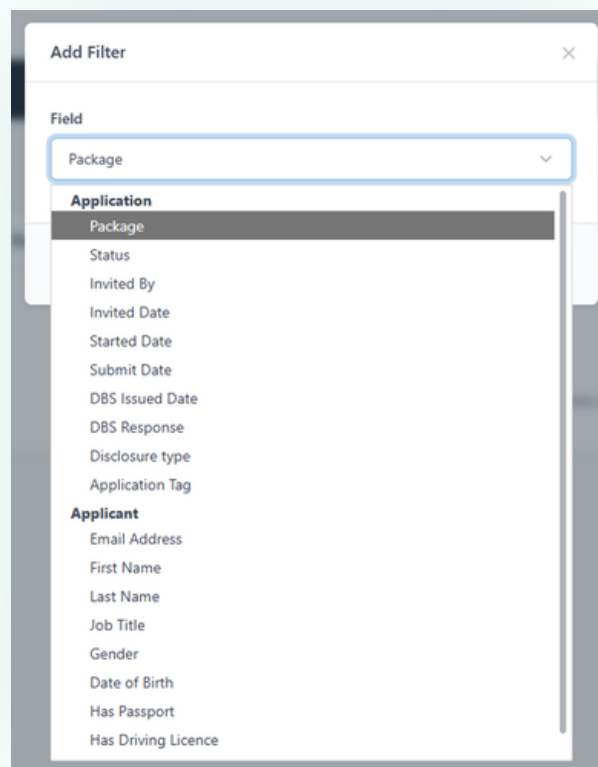
You can also create, customise, and save reports based on your organisation's reporting requirements. Custom reports can be created whenever needed and saved as templates for future use.



To create a custom report:

1. Select and choose a field from the list provided. This will give you the option select the information you would like to pull from the system.

2. Select



Reports - Custom Reporting

3. To refine your results, apply filtering criteria to narrow down the information displayed. Depending on the type of data selected you will be given a range of options such as:

The image shows three separate dropdown menus for filtering data:

- Email Address:** Options include 'Is', 'Is Not', 'Contains', 'Starts With', and 'Ends With'.
- Disclosure type:** Options include 'Is' and 'Is Not'.
- Invited Date:** Options include 'Is', 'Is Not', 'Greater Than', 'Greater Than or Equal To', 'Less Than', and 'Less Than or Equal To'.

4. You would then either need to choose a date, manually type in the field or select an option from a dropdown menu to define your filter criteria.

This block contains two screenshots illustrating filter criteria input:

- Invited Date:** A date picker for July 2026 is shown, with the 8th selected. Below the calendar are 'Clear' and 'Today' buttons.
- First Name:** A dropdown menu is set to 'Is', followed by a text input field and a trash icon. Below this is an 'Add Filter' button and a prominent blue 'Refresh Report' button.
- Disclosure type:** A dropdown menu is set to 'Is', followed by a dropdown menu showing 'Basic', 'Standard', and 'Enhanced' options, and a trash icon. Below this is another blue 'Refresh Report' button.

5. You can add multiple filters to a single report to further refine your results. Whenever you update or add filters, select “Refresh Report” to display the latest results.

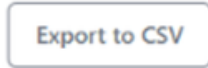
The screenshot shows the CBS Custom Reporting interface. On the left, there are filter sections for 'Custom Report' (set to 'Unsaved Report'), 'Disclosure type' (set to 'Is' and 'Enhanced'), and 'Status' (set to 'Is' and 'Created / Invited'). A blue 'Refresh Report' button is at the bottom of the filters. On the right, the 'Report Results' section shows '0 Applications Found' and an 'Export to CSV' button. Below this is a table with the following data:

ID	APPLICANT	STARTED APPLICATION	STATUS	DISCLOSURE
23398	Applicant Name		Registered	Enhanced
23376	Applicant Name		Registered	Enhanced
23106	Applicant Name		Registered	Enhanced
11368	Applicant Name		Registered	Enhanced
10502	Applicant Name		Registered	Enhanced
10500	Applicant Name		Registered	Enhanced
6062	Applicant Name		Registered	Enhanced
4669	Applicant Name		Registered	Enhanced

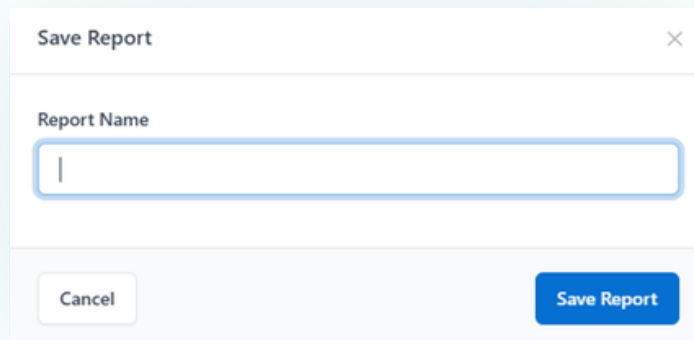


Reports - Custom Reporting

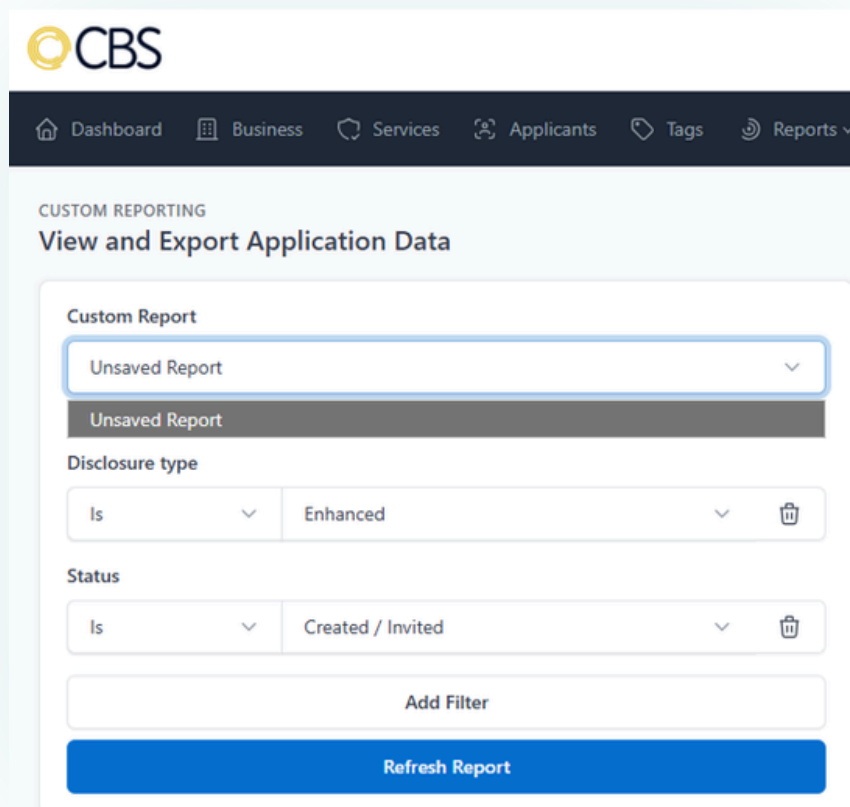
6. Reports can also be exported for use outside of the system by clicking:



7. Once your report has been configured, click [Save Report](#). You can save it with a chosen name, allowing you to reuse the same report template in the future.

A modal dialog box titled "Save Report" with a close button (X) in the top right corner. It contains a text input field labeled "Report Name" with a cursor inside. At the bottom, there are two buttons: "Cancel" on the left and "Save Report" on the right.

8. To locate the report template again, look for the report name in the dropdown option under Custom Report.

A screenshot of the CBS web application interface. The top navigation bar includes the CBS logo and links for Dashboard, Business, Services, Applicants, Tags, and Reports. The main section is titled "CUSTOM REPORTING" and "View and Export Application Data". It features a "Custom Report" dropdown menu currently showing "Unsaved Report". Below this are two filter sections: "Disclosure type" with "Is" and "Enhanced" options, and "Status" with "Is" and "Created / Invited" options. At the bottom of the filter section are buttons for "Add Filter" and "Refresh Report".



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