

# How to view/edit client details and download reports

## How to view MDS client details.

1. Go to 'Multi Deposit Scheme' and then 'Clients' tab
2. Click 'View client' on the relevant client's name to view their details.

## How to edit MDS client details.

3. Go to 'Multi Deposit Scheme' and then 'Clients' tab
4. Click 'View client' on the relevant client's name to view their details
5. Then click on 'Edit'
6. Make the required changes and click on 'Save'.

You will then get a notification that the client details have been successfully updated.

## How to access individual client reports.

1. Go to 'Multi Deposit Scheme' and then 'Clients' tab
2. Click 'View client' on the relevant client's name to view their details
3. Click on 'Download report'
4. Select the relevant report from the drop-down list and the relevant options from the subsequent fields such as report type, date range, format (e.g. pdf)
5. Click on 'Download report'.

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### Anna Garcia

Clientreference

Download report

Client details

Edit

Client name

Anna Garcia

Client reference

Garcia123

Address

1121 Tree Street  
Wellington, NZ 6011

Tax information

New Zealand tax resident  
M - RWT Liable Maximum 33%  
IRD 012-345-678

Administration fee

Scheme 5%

Deposit numbers

729	On call	Garcia123	
237	On call	Garcia123	
728	Term	Garcia123	\$0.00 >
Balance			\$100,000.00

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Anna Garcia

Clientreference

Download report

Edit client

Download report

Download report for Anna Garcia.

Report type

Client holdings

Date

20/11/2021

Format

☒ PDF

☐ CSV

Download report

Cancel