

Running and saving reports

Getting started

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Getting started

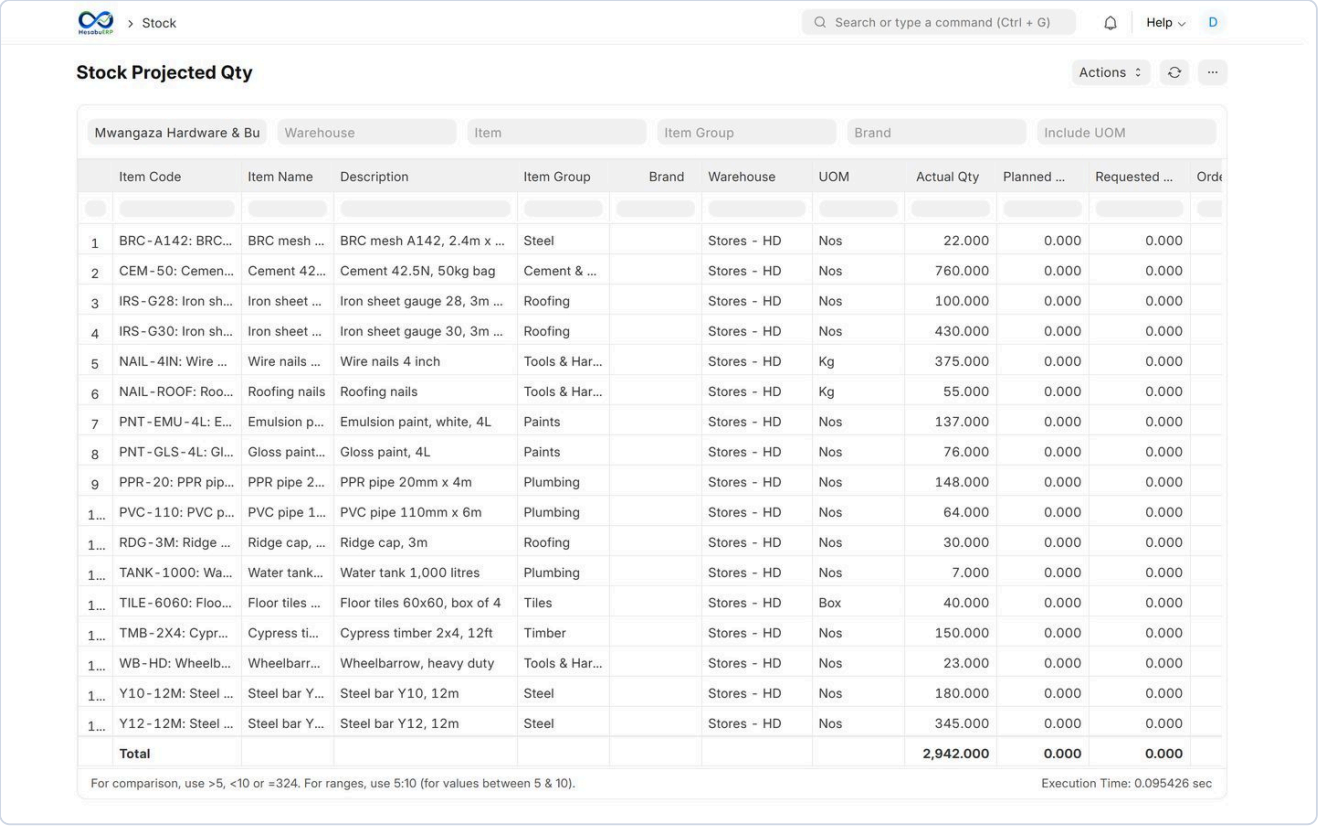
Running and saving reports

Open a report, change its filters, save your own version and export it.

Beginner · About 10 minutes · Version 1.0 · Updated 17 November 2026

Overview

Reports answer business questions: how much profit did we make, who owes us, what is in stock. Each module has its own reports, listed on its workspace under **Reports & Masters**.



	Item Code	Item Name	Description	Item Group	Brand	Warehouse	UOM	Actual Qty	Planned ...	Requested ...	Orde
1	BRC-A142: BRC...	BRC mesh ...	BRC mesh A142, 2.4m x ...	Steel		Stores - HD	Nos	22.000	0.000	0.000	
2	CEM-50: Cemen...	Cement 42...	Cement 42.5N, 50kg bag	Cement & ...		Stores - HD	Nos	760.000	0.000	0.000	
3	IRS-G28: Iron sh...	Iron sheet ...	Iron sheet gauge 28, 3m ...	Roofing		Stores - HD	Nos	100.000	0.000	0.000	
4	IRS-G30: Iron sh...	Iron sheet ...	Iron sheet gauge 30, 3m ...	Roofing		Stores - HD	Nos	430.000	0.000	0.000	
5	NAIL-4IN: Wire ...	Wire nails ...	Wire nails 4 inch	Tools & Har...		Stores - HD	Kg	375.000	0.000	0.000	
6	NAIL-ROOF: Roo...	Roofing nails	Roofing nails	Tools & Har...		Stores - HD	Kg	55.000	0.000	0.000	
7	PNT-EMU-4L: E...	Emulsion p...	Emulsion paint, white, 4L	Paints		Stores - HD	Nos	137.000	0.000	0.000	
8	PNT-GLS-4L: Gl...	Gloss paint...	Gloss paint, 4L	Paints		Stores - HD	Nos	76.000	0.000	0.000	
9	PPR-20: PPR pip...	PPR pipe 2...	PPR pipe 20mm x 4m	Plumbing		Stores - HD	Nos	148.000	0.000	0.000	
1...	PVC-110: PVC p...	PVC pipe 1...	PVC pipe 110mm x 6m	Plumbing		Stores - HD	Nos	64.000	0.000	0.000	
1...	RDG-3M: Ridge ...	Ridge cap, ...	Ridge cap, 3m	Roofing		Stores - HD	Nos	30.000	0.000	0.000	
1...	TANK-1000: Wa...	Water tank...	Water tank 1,000 litres	Plumbing		Stores - HD	Nos	7.000	0.000	0.000	
1...	TILE-6060: Floo...	Floor tiles ...	Floor tiles 60x60, box of 4	Tiles		Stores - HD	Box	40.000	0.000	0.000	
1...	TMB-2X4: Cypr...	Cypress ti...	Cypress timber 2x4, 12ft	Timber		Stores - HD	Nos	150.000	0.000	0.000	
1...	WB-HD: Wheelb...	Wheelbarr...	Wheelbarrow, heavy duty	Tools & Har...		Stores - HD	Nos	23.000	0.000	0.000	
1...	Y10-12M: Steel ...	Steel bar Y...	Steel bar Y10, 12m	Steel		Stores - HD	Nos	180.000	0.000	0.000	
1...	Y12-12M: Steel ...	Steel bar Y...	Steel bar Y12, 12m	Steel		Stores - HD	Nos	345.000	0.000	0.000	
	Total							**2,942.000**	**0.000**	**0.000**	

For comparison, use >5, <10 or =324. For ranges, use 5:10 (for values between 5 & 10). Execution Time: 0.095426 sec

The Stock Projected Qty report, with filters across the top and a total row at the bottom.

Steps

1. Open a module workspace, such as **Stock**, and find the report under **Reports**. Or type the report name in the search bar.
2. Set the **filters** at the top, such as **Company**, **Warehouse** or date range. The report updates.
3. Use the column headers to sort. Use the **Menu** at the top right for more options.
4. To keep your filters, choose **Save** in the menu and name the report. It appears in your list of reports.
5. To share it, use **Menu**, then **Export** (Excel or CSV) or **Print** (PDF).

Practical example

The storekeeper opens **Stock Projected Qty**, filters by the Stores warehouse and the Steel item group, and exports to Excel to send to the supplier as an order list.

Important notes

- Some reports need mandatory filters, such as the company or a date. If a report looks empty, check these first.
- Reports show posted (submitted) documents. Drafts are not included.
- Totals in the last row add the numeric columns.

Common mistakes

- Reading a report with the wrong company or fiscal year selected.
- Expecting a draft invoice to appear in a financial report.

Next steps

Read Attachments and files.

Related documentation

- Financial reports
- Stock reports
- Filtering, sorting and exporting records