

[BACK](#)

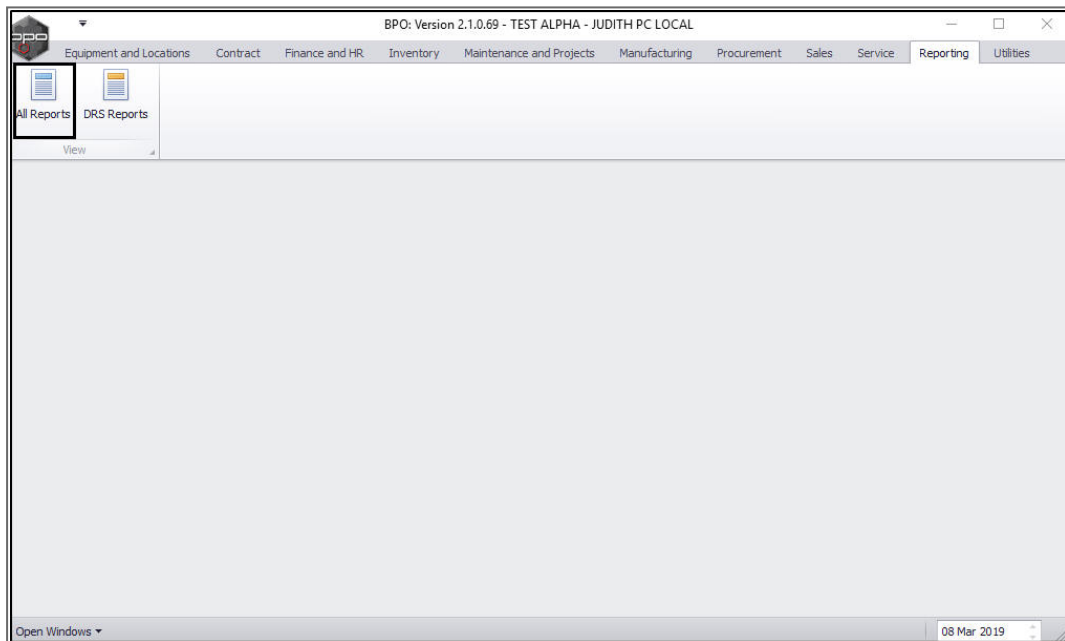
## REPORTING

### ALL REPORTS – EXPORT AND PIVOT CHART

#### Introduction

In **BPO**, you can export a report to **Excel** or **PDF** as well as create a report pivot chart.

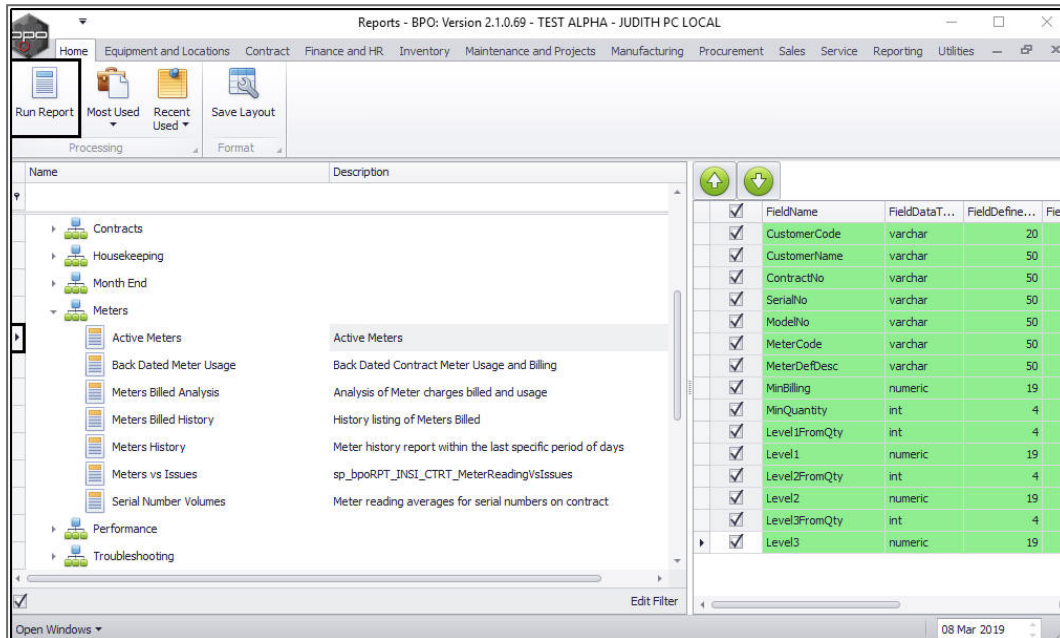
**Ribbon Access:** *Reporting > All Reports*



The **Reports** screen will be displayed.

## SELECT AND RUN REPORT

- Browse or search for the report you want to view.
  - In this image, **Active Meters** has been selected.
- Click on **Run Report**.



- The report screen specific to the selected report will be displayed.
  - In this image, the **Active Meters** screen has been displayed.

Active Meters BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Run Report Sync Save Layout Excel PDF Show Groups

Report: Data Analysis

Report Results:

Drag a column header here to group by that column

CustomerCode	CustomerName	ContractNo	SerialNo	ModelNo	MeterCode	MeterDefDesc	MinBilling	MinQuantity	Level1FromQty	Level1	Level2From
DON0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono	Mono meter	980.76	1 000	0	10.55	
JUS001	Just In Time	CO0000156	2020-6543J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	31.50	
JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	126.00	
BIG0001	Big Bargains	CO0000164	2020-5678B	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-8918ZF	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-8918ZF	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Mono	Mono meter	1 050.00	1 000	0	126.00	

126

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## EXPORT REPORT TO EXCEL

- Click on *Excel*.

Active Meters - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Run Report Sync Save Layout Excel PDF Show Groups

Report: Data Analysis

Report Results:

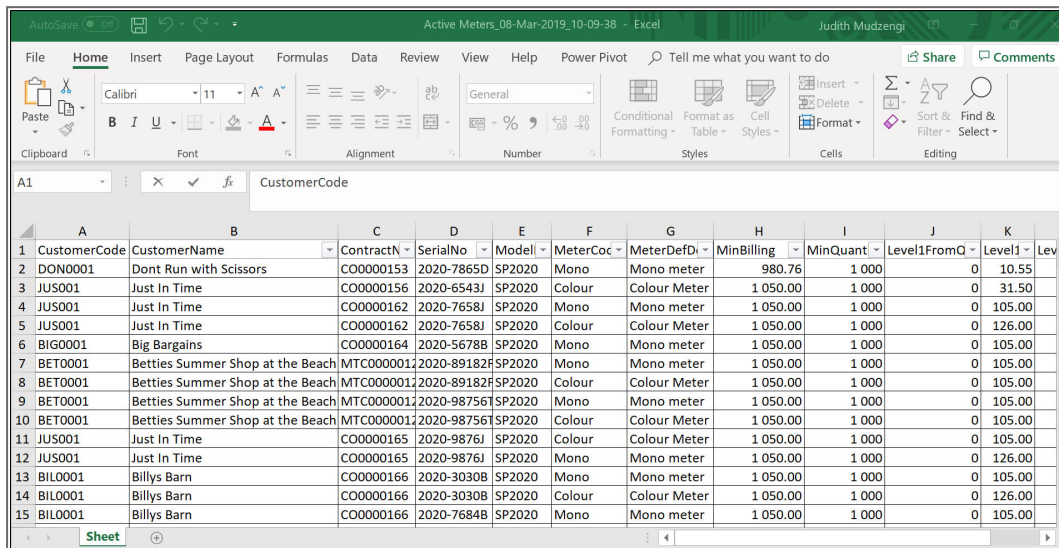
Drag a column header here to group by that column

CustomerCode	CustomerName	ContractNo	SerialNo	ModelNo	MeterCode	MeterDefDesc	MinBilling	MinQuantity	Level1FromQty	Level1	Level2From
DON0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono	Mono meter	980.76	1 000	0	10.55	
JUS001	Just In Time	CO0000156	2020-6543J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	31.50	
JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	126.00	
BIG0001	Big Bargains	CO0000164	2020-5678B	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-8918ZF	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-8918ZF	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Mono	Mono meter	1 050.00	1 000	0	126.00	

126

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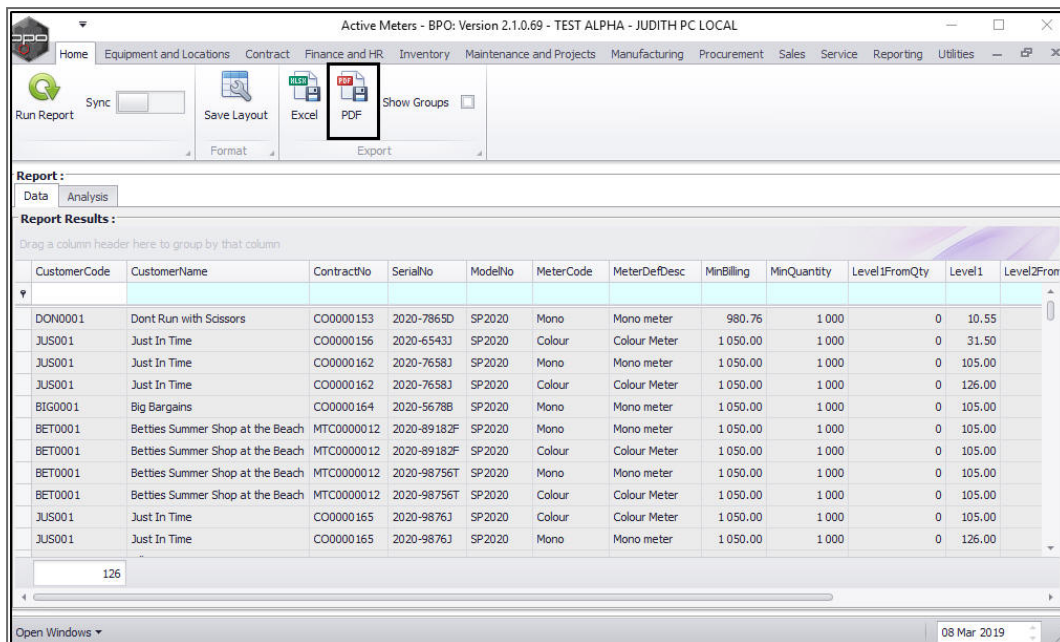
- This will open **MS Excel** with a new spreadsheet and load all the data from the data grid into that spreadsheet.
- You can then save, view, search for data, prepare it for printing, etc. as required.



A	B	C	D	E	F	G	H	I	J	K	L
CustomerCode	CustomerName	ContractN	SerialNo	Modell	MeterCoc	MeterDefDi	MinBilling	MinQuant	Level1FromQ	Level1	Lev
DON0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono	Mono meter	980.76	1 000	0	10.55	
JUS001	Just In Time	CO0000156	2020-6543J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	31.50	
JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	126.00	
BIG0001	Big Bargains	CO0000164	2020-5678B	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000011	2020-89182F	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000011	2020-89182F	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000011	2020-98756F	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000011	2020-98756F	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Mono	Mono meter	1 050.00	1 000	0	126.00	
BIL0001	Billys Barn	CO0000166	2020-3030B	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BIL0001	Billys Barn	CO0000166	2020-3030B	SP2020	Colour	Colour Meter	1 050.00	1 000	0	126.00	
BIL0001	Billys Barn	CO0000166	2020-7684B	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	

## EXPORT REPORT TO PDF

- Click on **PDF**



Active Meters - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Run Report Sync Save Layout Excel PDF Show Groups

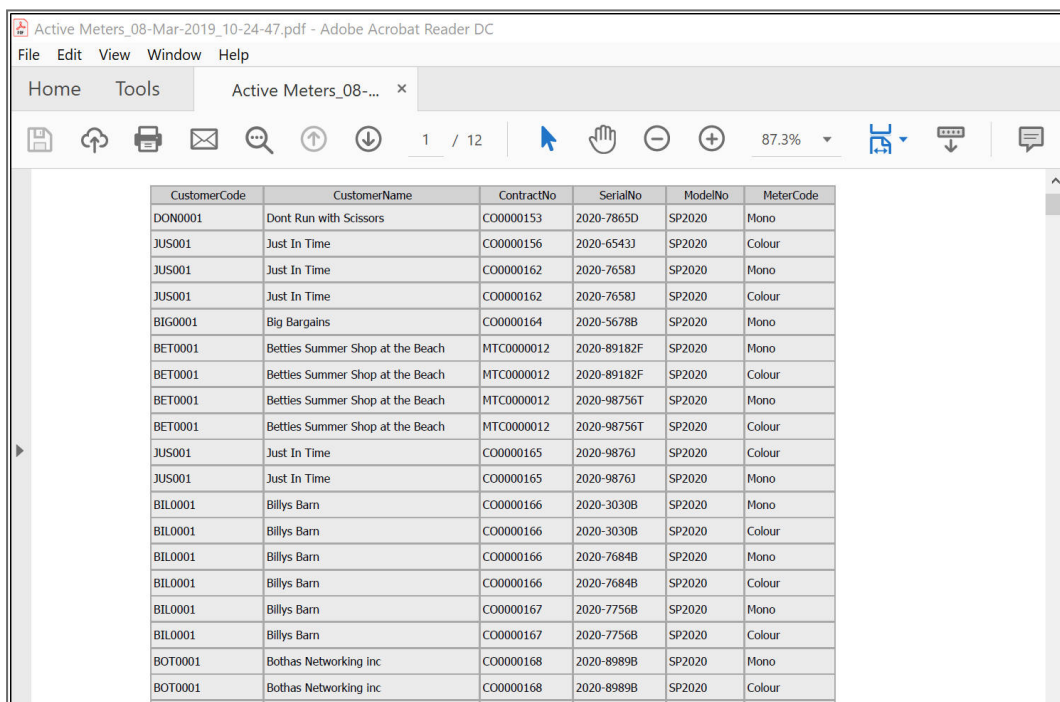
Report Results:

CustomerCode	CustomerName	ContractNo	SerialNo	ModelNo	MeterCode	MeterDefDesc	MinBilling	MinQuantity	Level1FromQty	Level1	Level2From
DON0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono	Mono meter	980.76	1 000	0	10.55	
JUS001	Just In Time	CO0000156	2020-6543J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	31.50	
JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	126.00	
BIG0001	Big Bargains	CO0000164	2020-5678B	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Mono	Mono meter	1 050.00	1 000	0	126.00	

126

Open Windows 08 Mar 2019

- The data from the data grid will be displayed in the **PDF Reader**.
- You can then save, view, print the data etc. as required.



Active Meters\_08-Mar-2019\_10-24-47.pdf - Adobe Acrobat Reader DC

File Edit View Window Help

Home Tools Active Meters\_08-... x

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CustomerCode	CustomerName	ContractNo	SerialNo	ModelNo	MeterCode
DON0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono
JUS001	Just In Time	CO0000156	2020-6543J	SP2020	Colour
JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Mono
JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Colour
BIG0001	Big Bargains	CO0000164	2020-5678B	SP2020	Mono
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Mono
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Colour
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Mono
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Colour
JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Colour
JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Mono
BIL0001	Billys Barn	CO0000166	2020-3030B	SP2020	Mono
BIL0001	Billys Barn	CO0000166	2020-3030B	SP2020	Colour
BIL0001	Billys Barn	CO0000166	2020-7684B	SP2020	Mono
BIL0001	Billys Barn	CO0000166	2020-7684B	SP2020	Colour
BIL0001	Billys Barn	CO0000167	2020-7756B	SP2020	Mono
BIL0001	Billys Barn	CO0000167	2020-7756B	SP2020	Colour
BOT0001	Bothas Networking Inc	CO0000168	2020-8989B	SP2020	Mono
BOT0001	Bothas Networking Inc	CO0000168	2020-8989B	SP2020	Colour

## SELECTING AND COPYING DATA

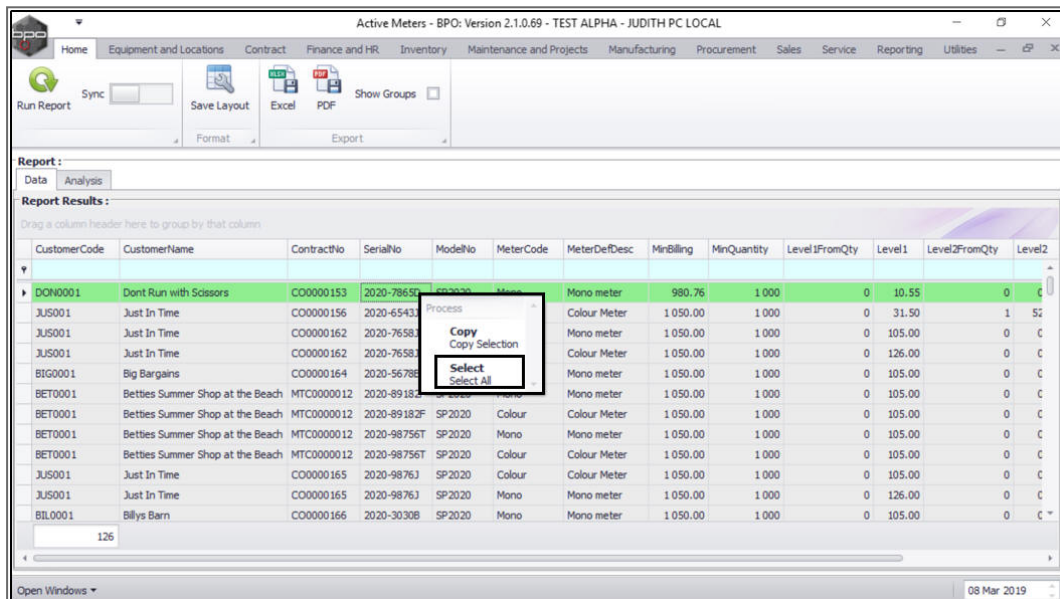
To select **all** data in the data grid:

*Either,*

- **Right click** and click on **Select All** from the pop up **Process** menu.

*Or,*

- Press **Ctrl + A** on the keyboard.



To copy **selected** data in the data grid,

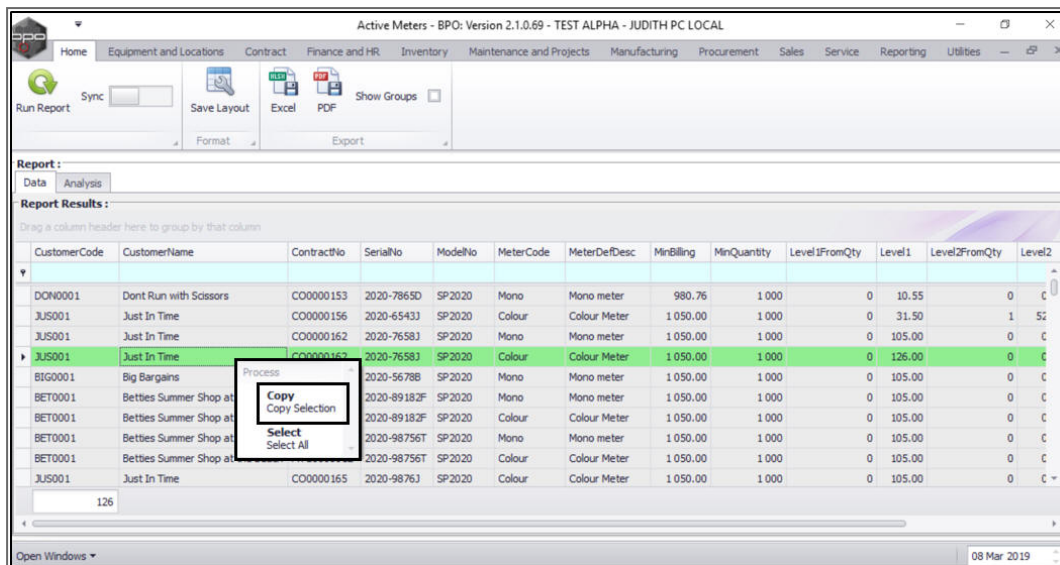
*Either,*

- **Right click** and then click on **Copy Selection** from the pop up **Process** menu.

*or,*

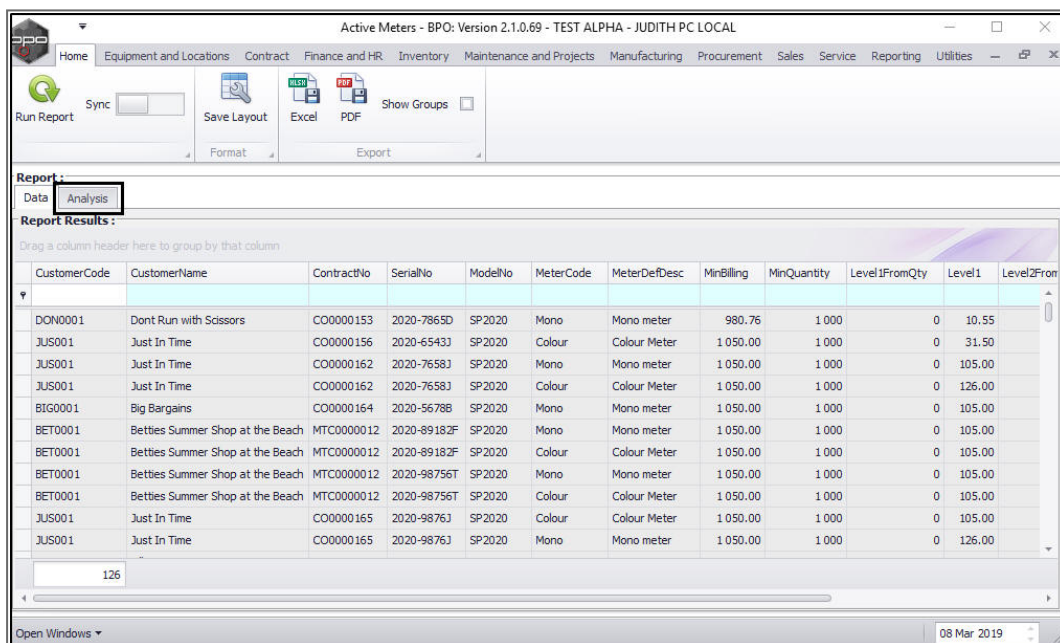
- Press **Ctrl + C** on the keyboard.





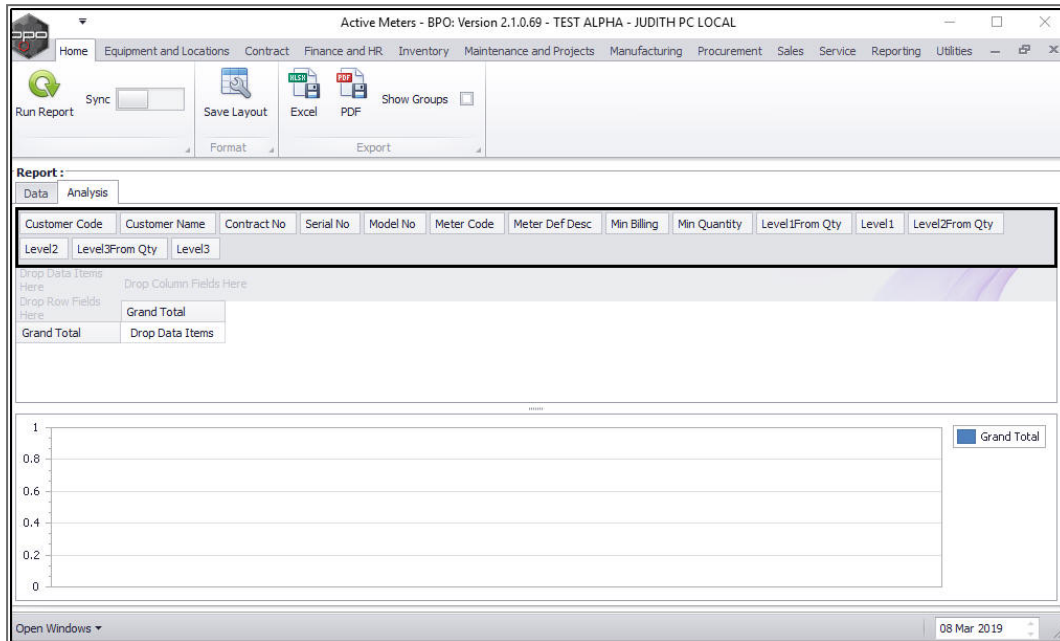
## CREATE PIVOT CHART

- Click on the **Analysis** tab.



- The available report column headers will be displayed just below the **Analysis** tab.

- Decide which information (headers) you wish to use for the pivot chart.



## SELECTING COLUMNS FOR THE PIVOT CHART

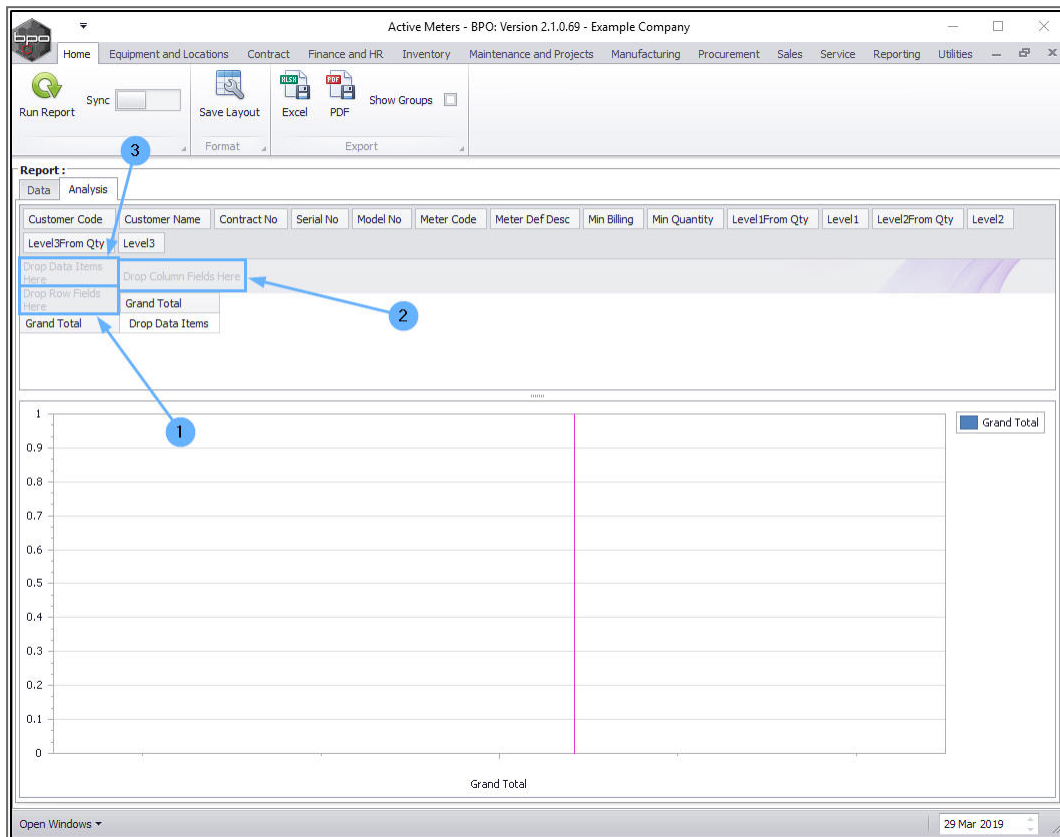
The columns you wish to select for the Pivot Chart must be **dragged** and **dropped** into the relevant areas:

1. **Rows:** Drop selected column header(s) in the **Drop Row Fields Here** area.
2. **Columns:** Drop selected column header(s) in the **Drop Column Fields Here** area.
3. **Data Items:** Drop selected column header(s) in the **Drop Data Items Here** area.

**Note 1:** It is **not** mandatory to drop columns in all 3 fields, for example you can drop columns in **Row** field and **Data** field but leave out the **Column** field.

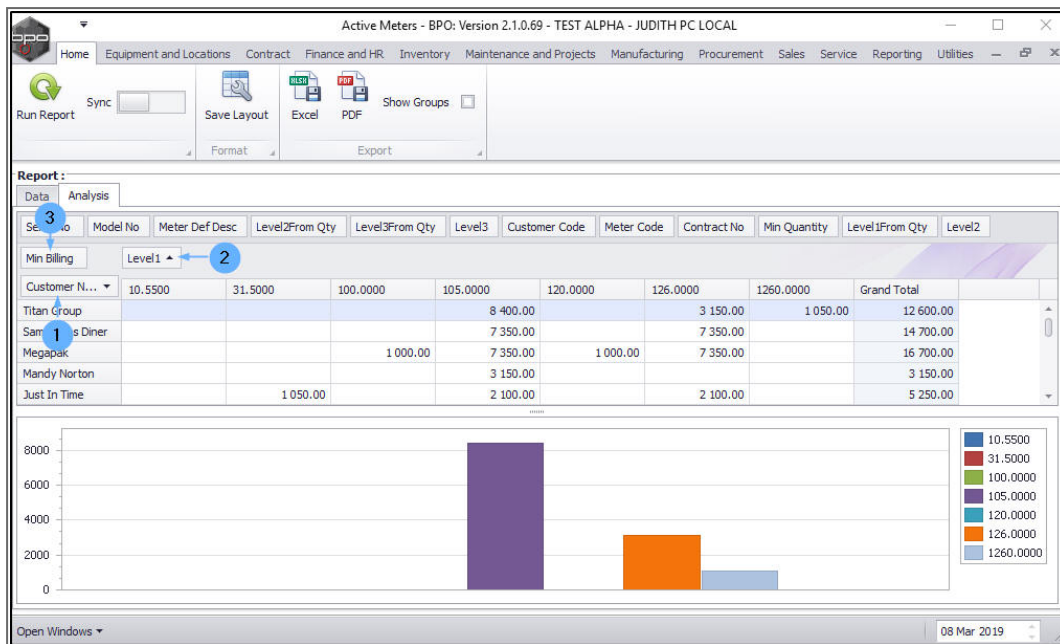


**Note :** You can drop *multiple* columns in a field for example, you can drop *Serial No* and *Model No* columns in the *Row* field.

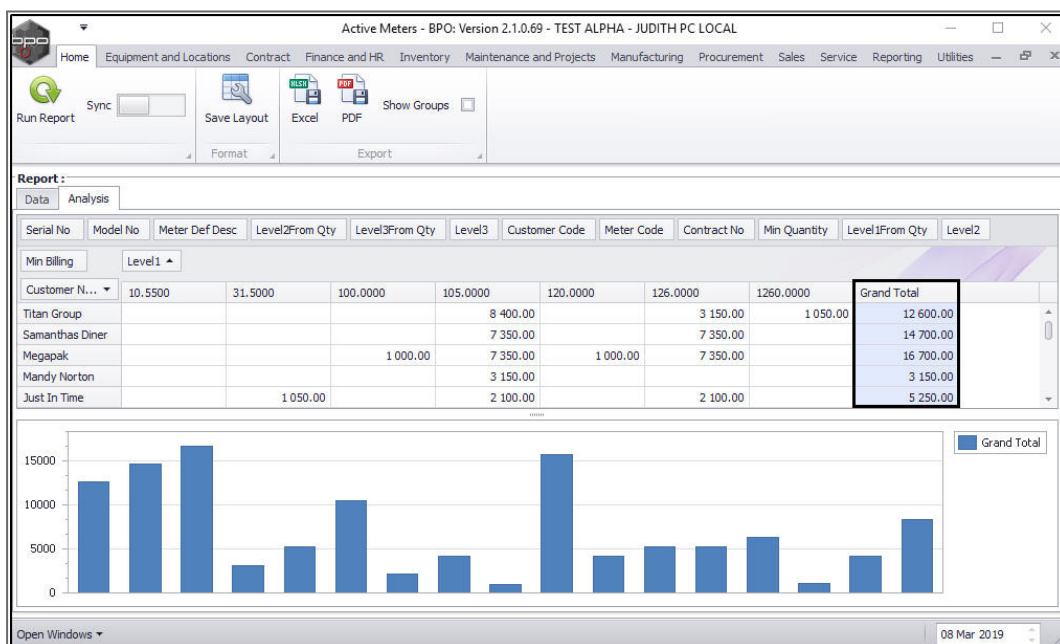


In this example,

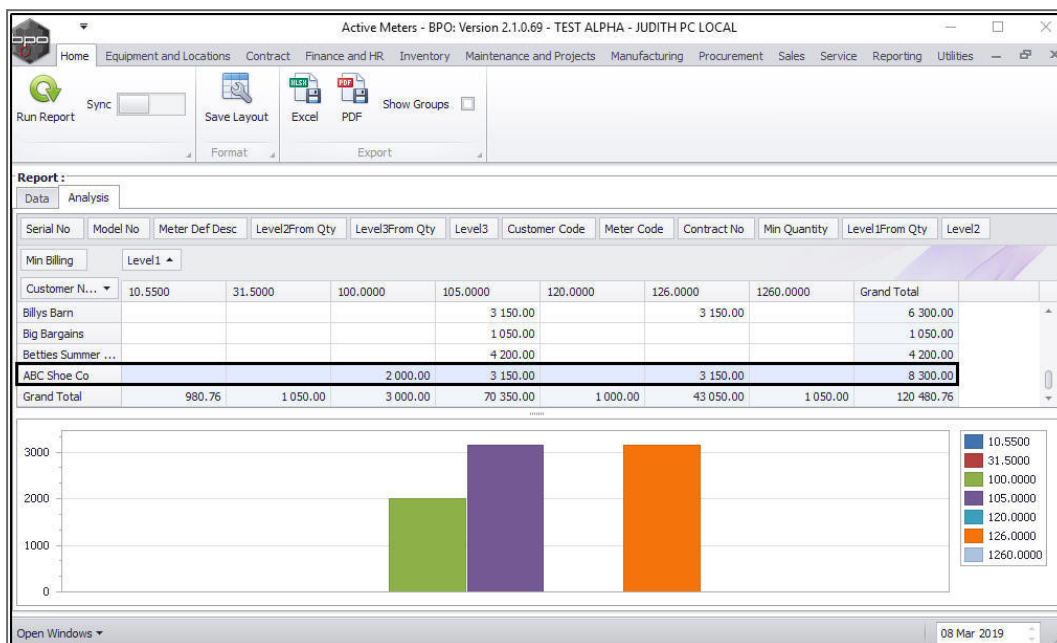
1. **Customer Name** has been dropped in the **Row** field,
2. **Level 1** has been dropped in the **Column** field and
3. **Min Billing** has been dropped in the **Data** field.



- You can pull a report *per column* by clicking on the column of your choice.
- In this image, **Grand Total** column has been selected and the report displayed is specific to the data in that column.



- You can also pull a report **per row** by clicking on the row of your choice.
- In this image, **ABC Shoe Co** row has been selected and the report displayed is specific to the data in that row.



**Note:** You also export the pivot charts to **Excel** or to **PDF**.

## RELATED TOPICS

- [Introduction to All Reports](#)
- [Report View](#)



CO3 Technologies (Pty) Ltd



Company Confidential

FEEDBACK

Status: .....

MNU.149.004

Software Version: .....

14 June, 2024

Date: .....

MNU.149.004