We are currently updating our site; thank you for your patience.

BACK

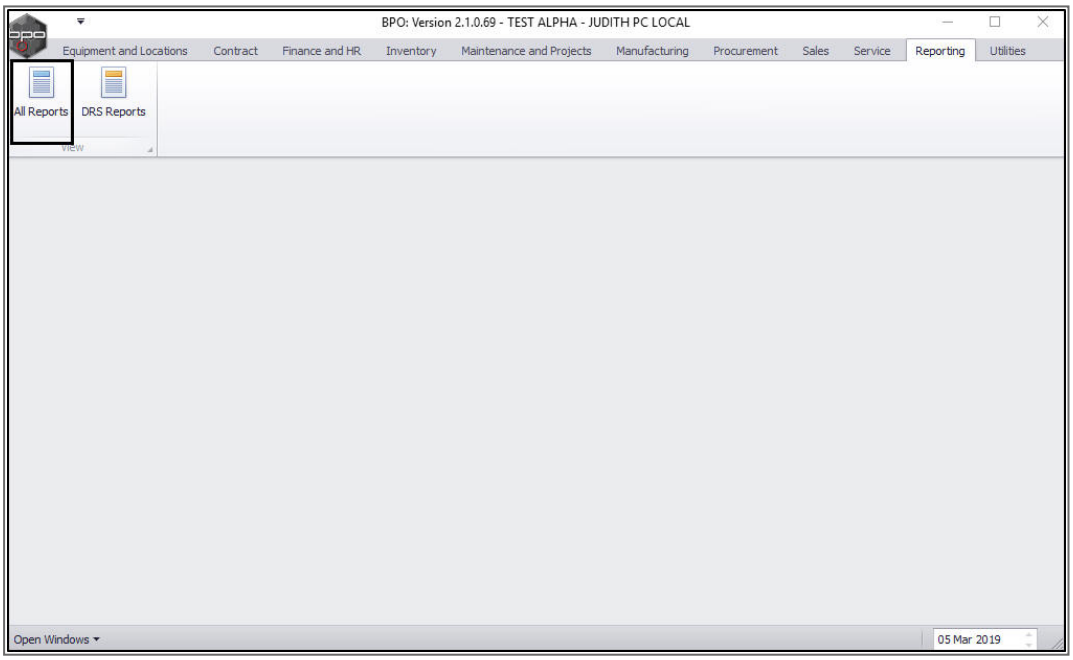
REPORTING

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 Select **Reporting > All Reports**



The **Reports** screen will be displayed.

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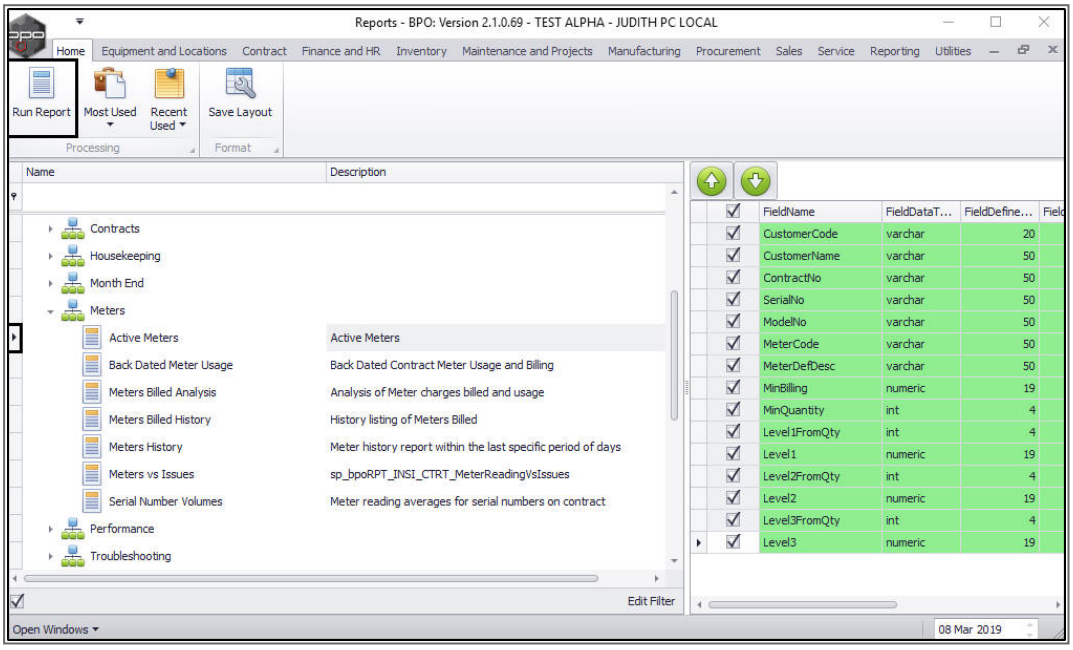
SELECT AND RUN REPORT

- 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.

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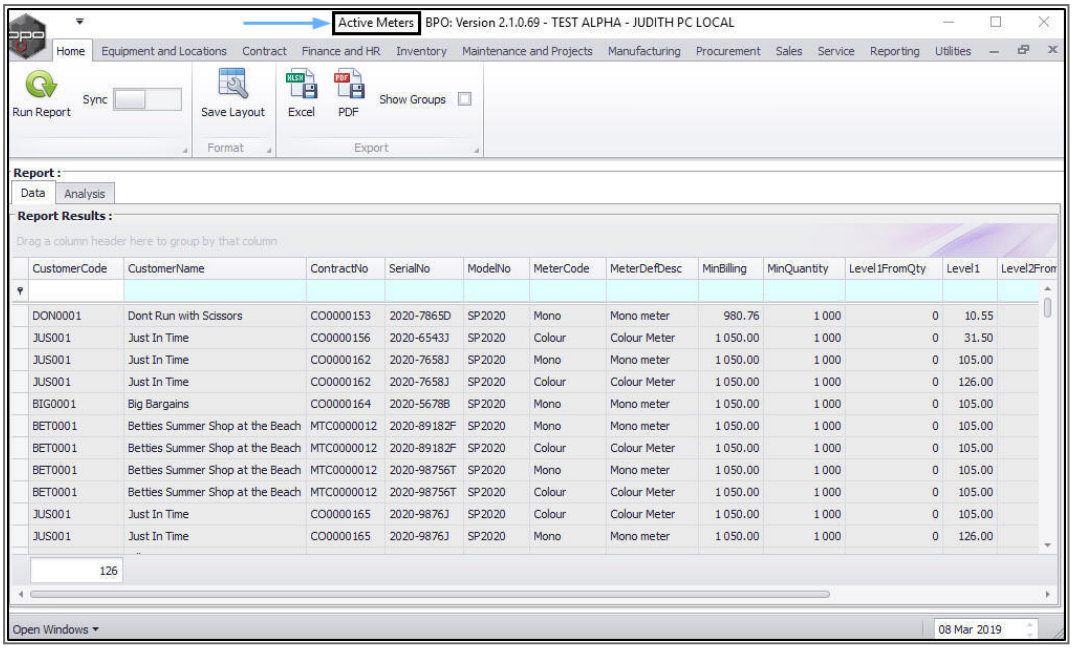
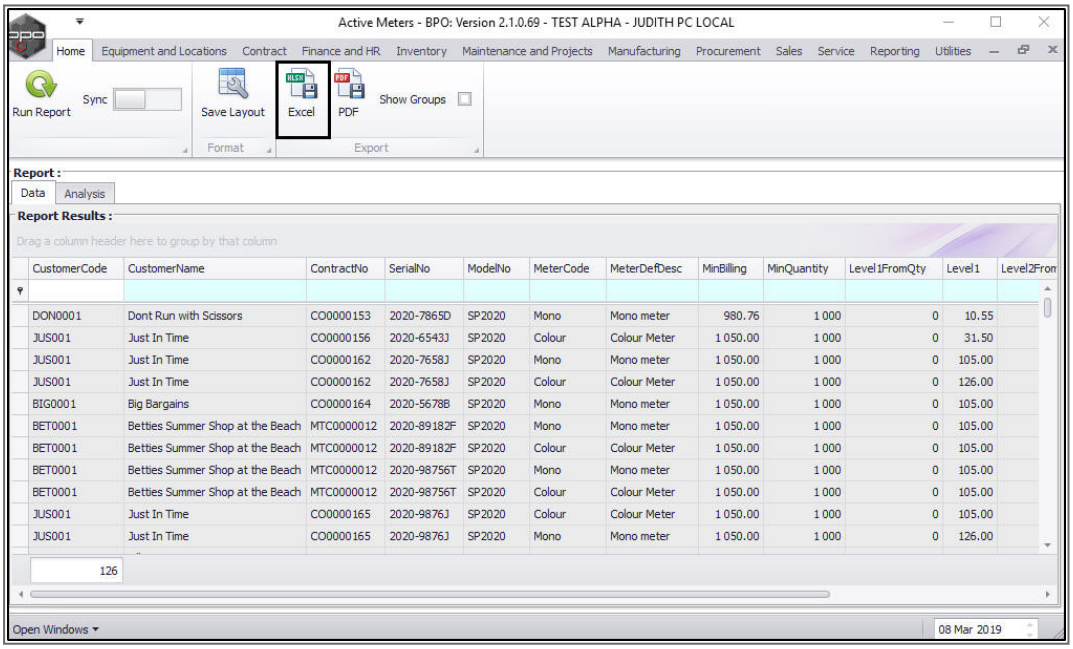


EXPORT REPORT TO EXCEL

- Click on **Excel**.



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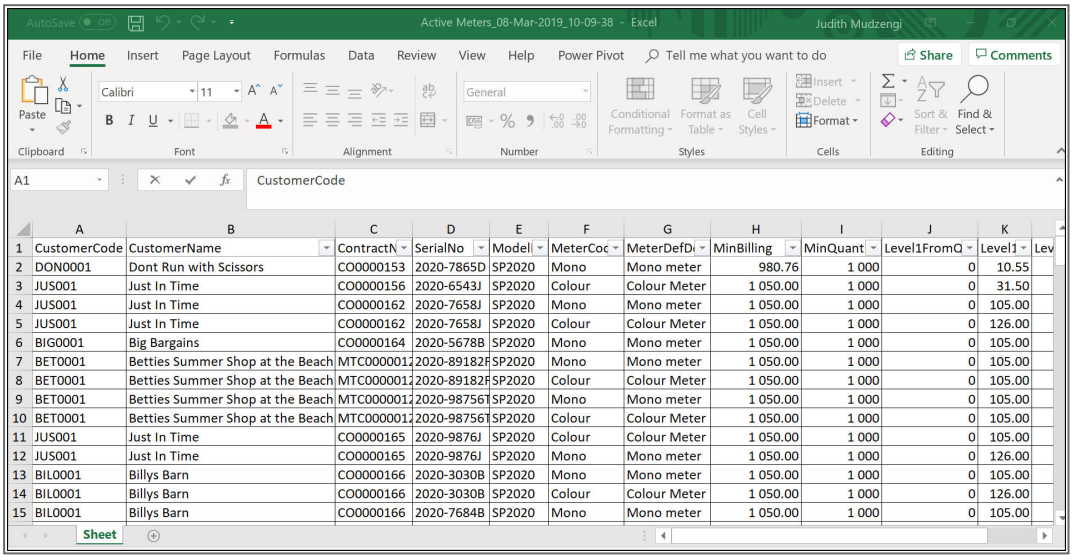
- This will open **MS Excel** with a new spreadsheet and load all the data from the data grid into that spreadsheet.
- You can then save, view, search for data, prepare it for printing, etc. as required.



	A	B	C	D	E	F	G	H	I	J	K
1	CustomerCode	CustomerName	ContractN	SerialNo	Model	MeterCoc	MeterDefDe	MinBilling	MinQuant	Level1FromQ	Level1
2	DON0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono	Mono meter	980.76	1 000	0	10.55
3	JUS001	Just In Time	CO0000156	2020-6543J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	31.50
4	JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00
5	JUS001	Just In Time	CO0000162	2020-7658J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	126.00
6	BIG0001	Big Bargains	CO0000164	2020-5678B	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00
7	BET0001	Betties Summer Shop at the Beach	MTC000001	2020-89182F	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00
8	BET0001	Betties Summer Shop at the Beach	MTC000001	2020-89182F	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00
9	BET0001	Betties Summer Shop at the Beach	MTC000001	2020-98756T	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00
10	BET0001	Betties Summer Shop at the Beach	MTC000001	2020-98756T	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00
11	JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00
12	JUS001	Just In Time	CO0000165	2020-9876J	SP2020	Mono	Mono meter	1 050.00	1 000	0	126.00
13	BIL0001	Billys Barn	CO0000166	2020-3030B	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00
14	BIL0001	Billys Barn	CO0000166	2020-3030B	SP2020	Colour	Colour Meter	1 050.00	1 000	0	126.00
15	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**

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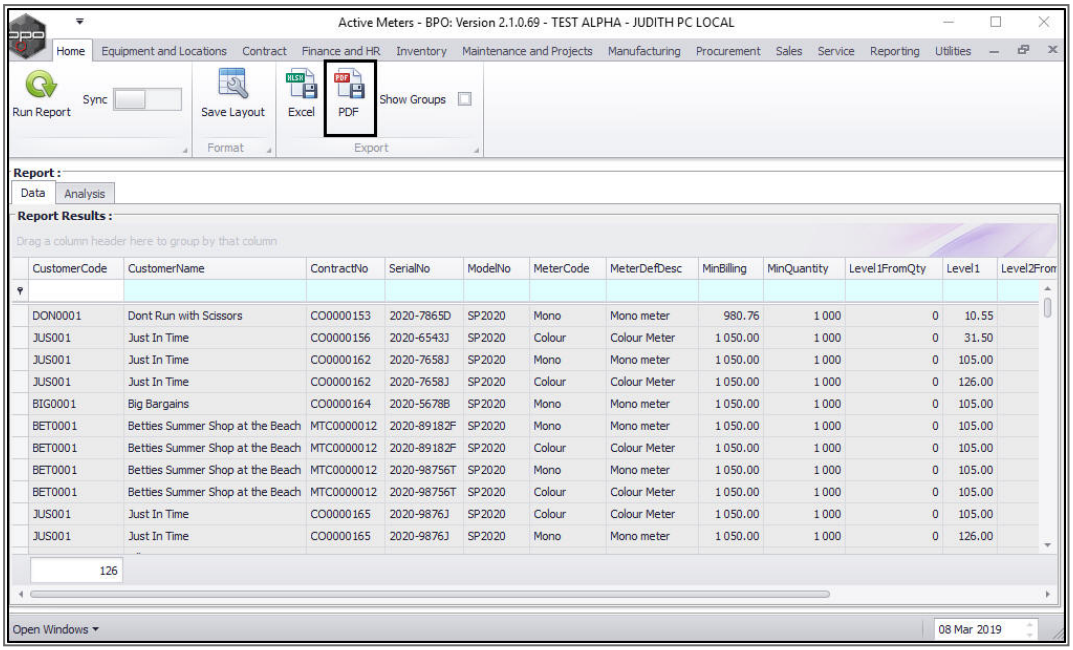
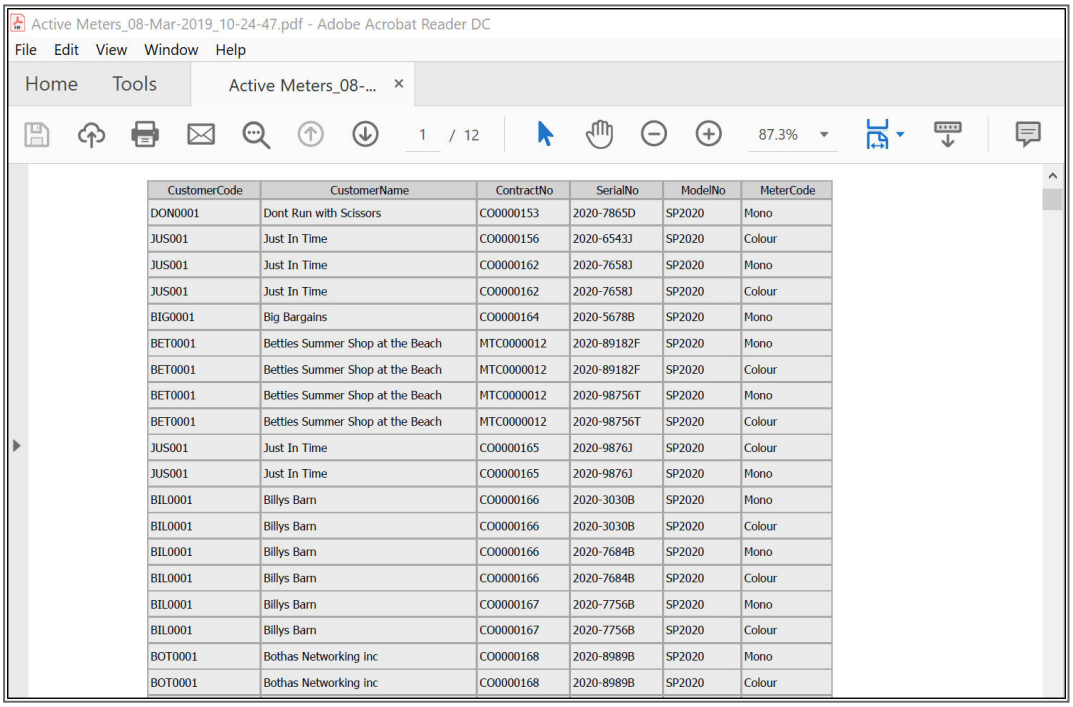


- The data from the data grid will be displayed in the **PDF Reader**.
- You can then save, view, print the data etc. as required.



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SELECTING AND COPYING DATA

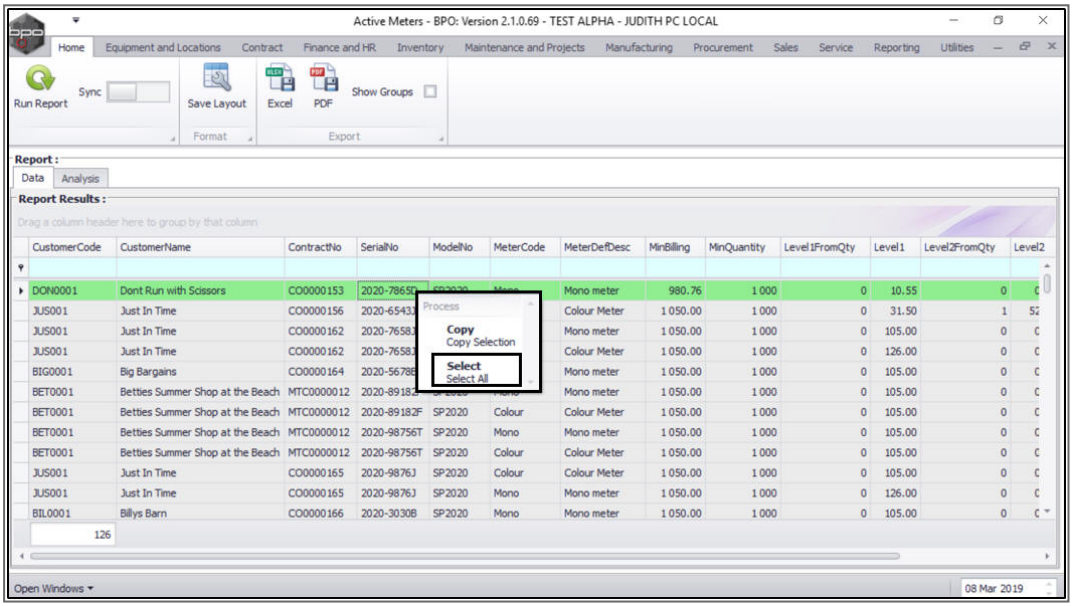
To select **all** data in the data grid:

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.

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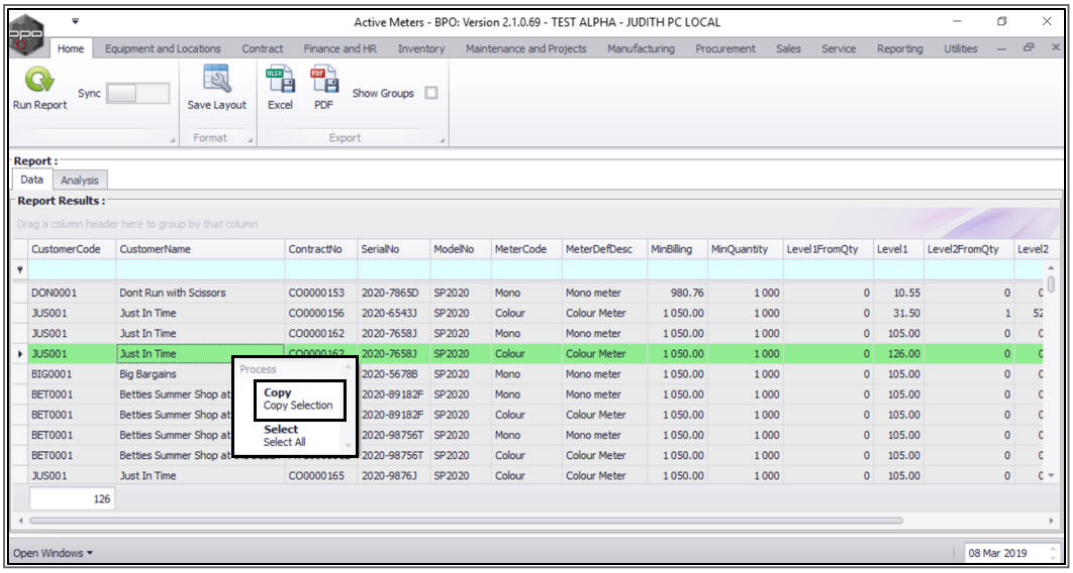
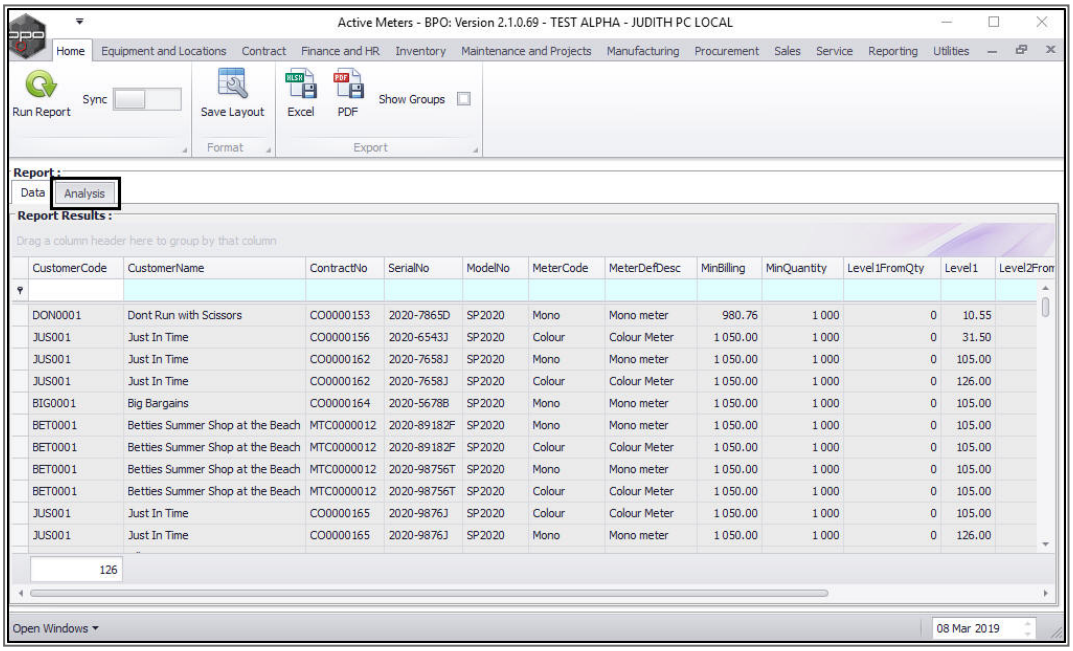


CREATE PIVOT CHART

- Click on the **Analysis** tab.



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

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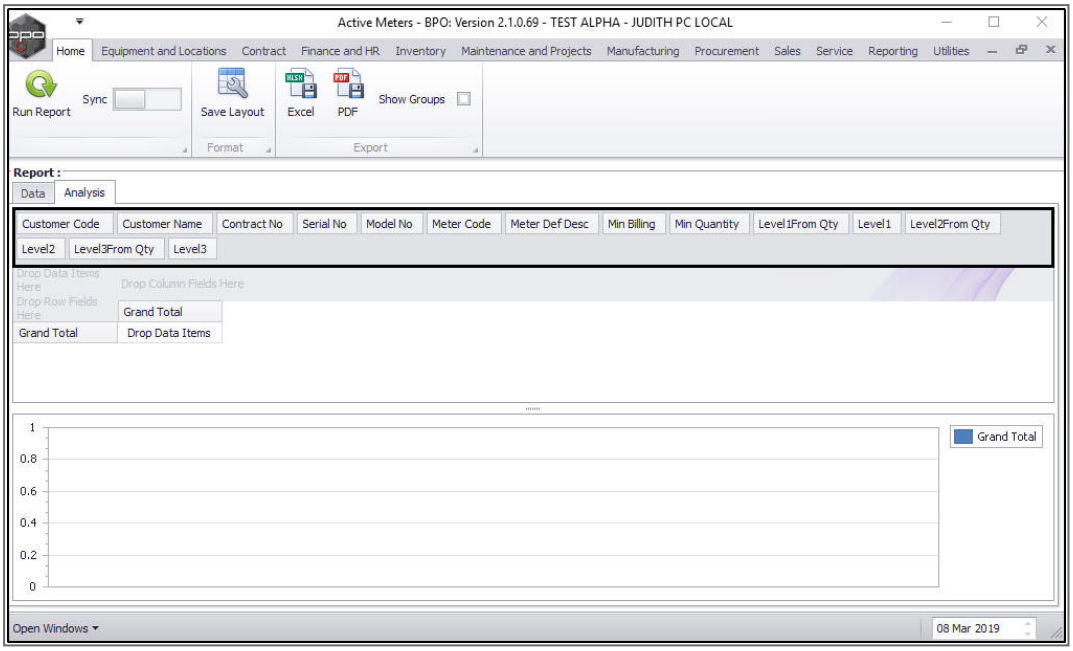
- Decide which information (headers) you wish to use for the pivot chart.



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.

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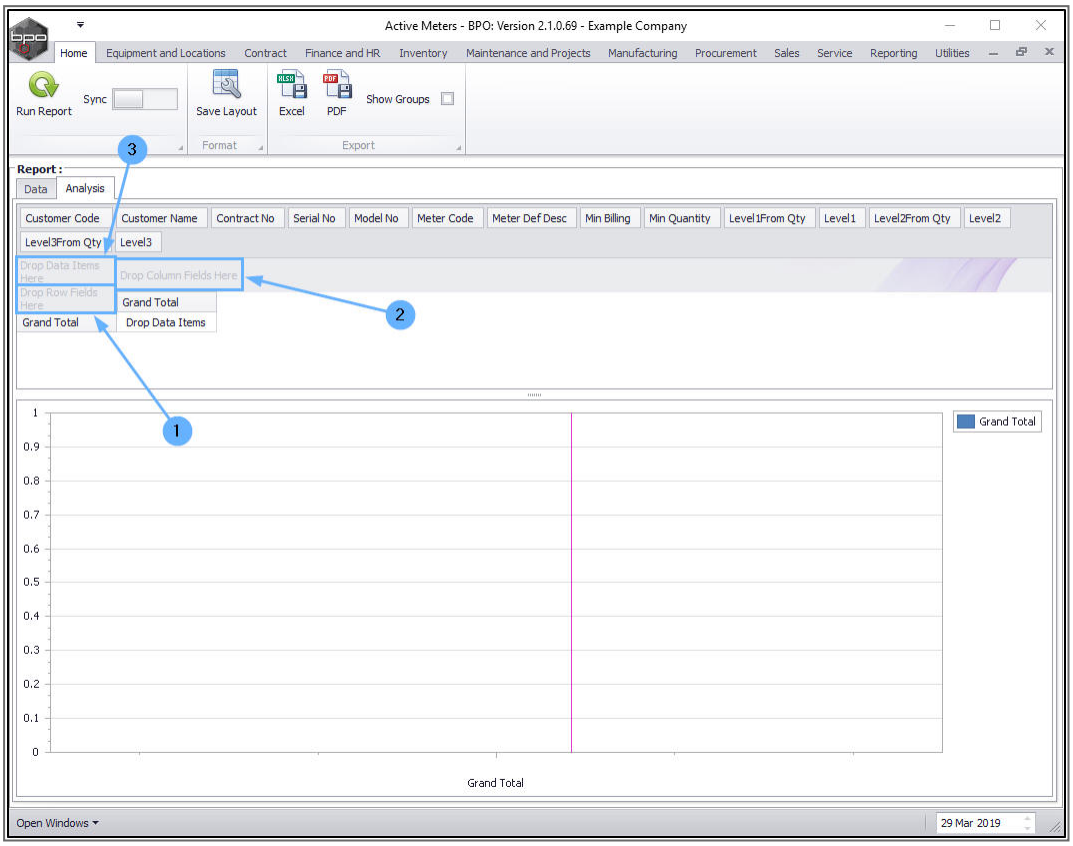
Note : You can drop **multiple** columns in a field for example, you can drop **Serial No** and **Model No** columns in the **Row** field.



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.

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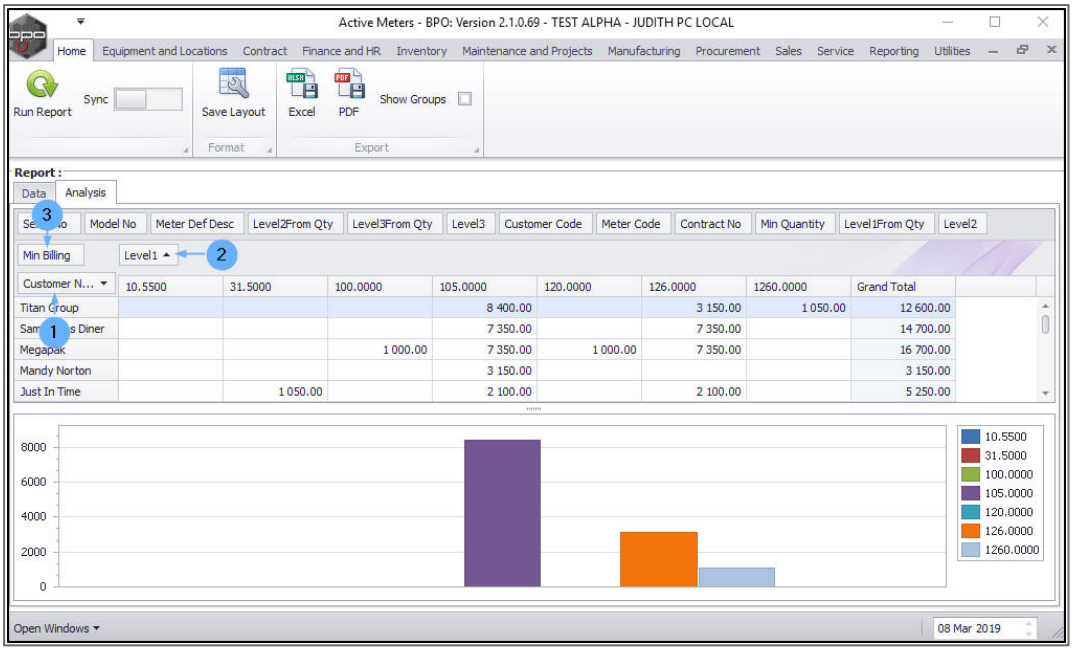
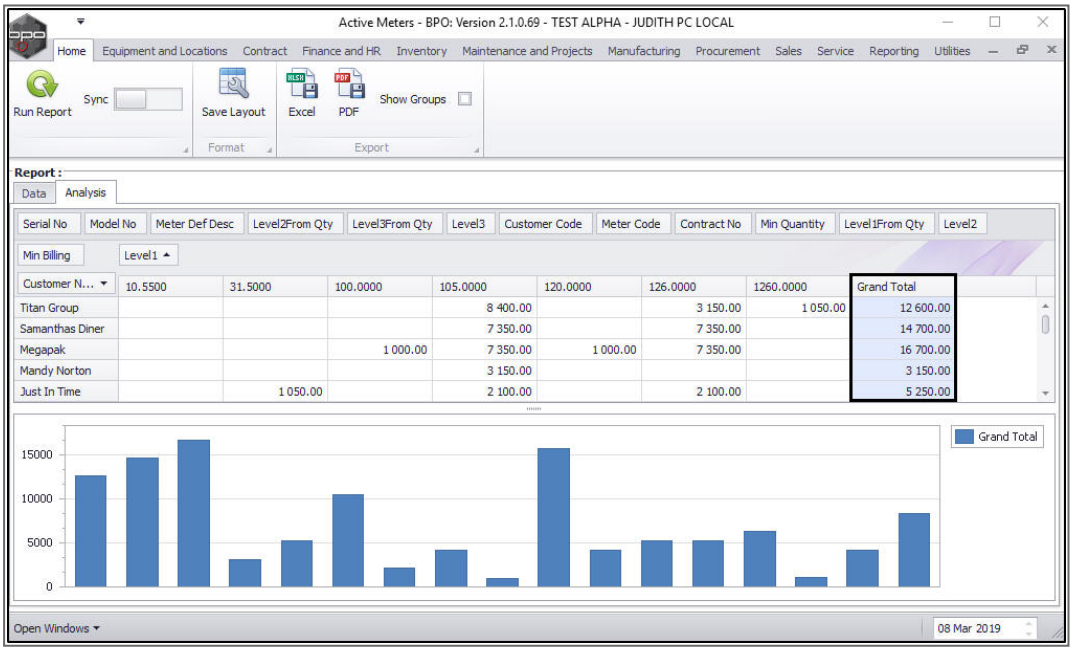


- You can pull a report **per column** by clicking on the column of your choice.
- In this image, **Grand Total** column has been selected and the report displayed is specific to the data in that column.



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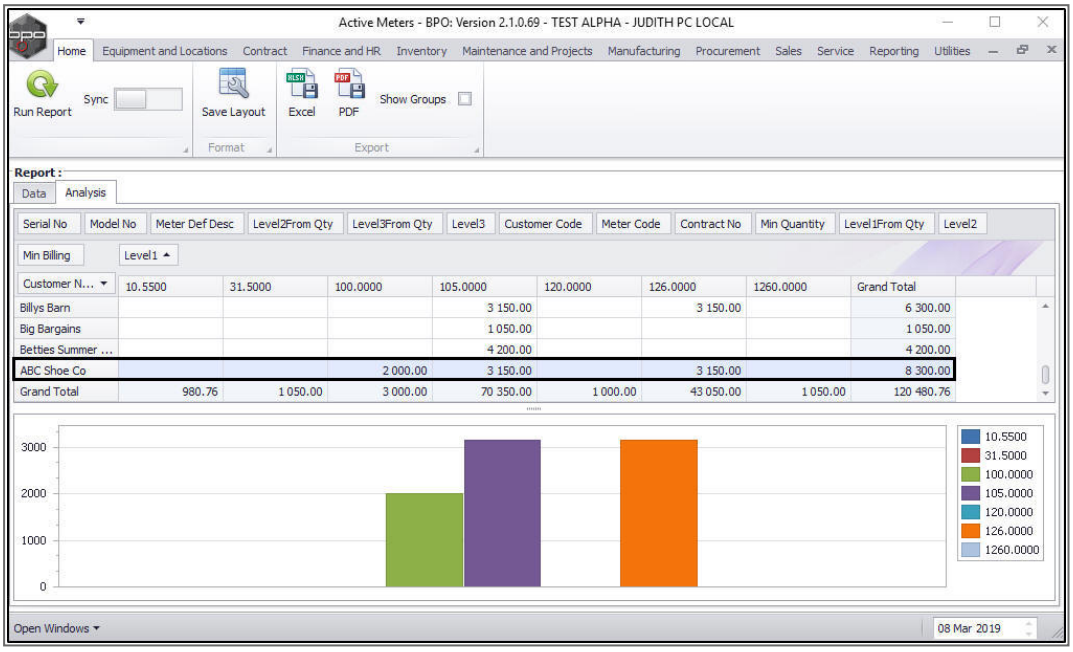
- You can also pull a report **per row** by clicking on the row of your choice.
- In this image, **ABC Show Co** row has been selected and the report displayed is specific to the data in that row.



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

RELATED TOPICS

- Introduction to All Reports
- Report View

FEEDBACK

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Status: .....

MNU.149.004

Software Version: .....

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