

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

[BACK](#)

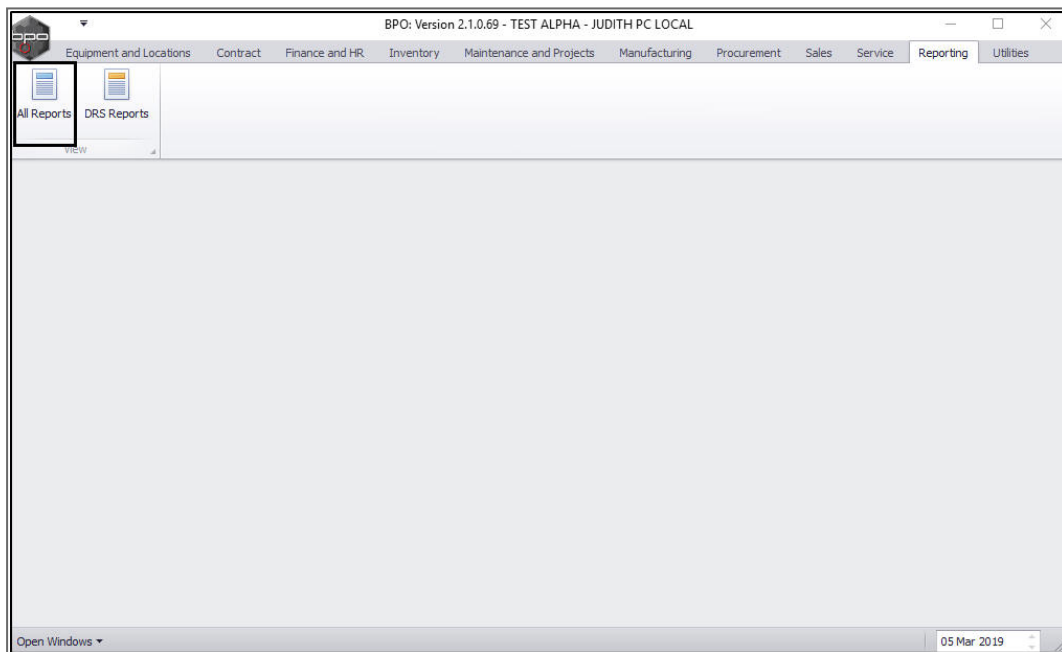
REPORTING

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**.

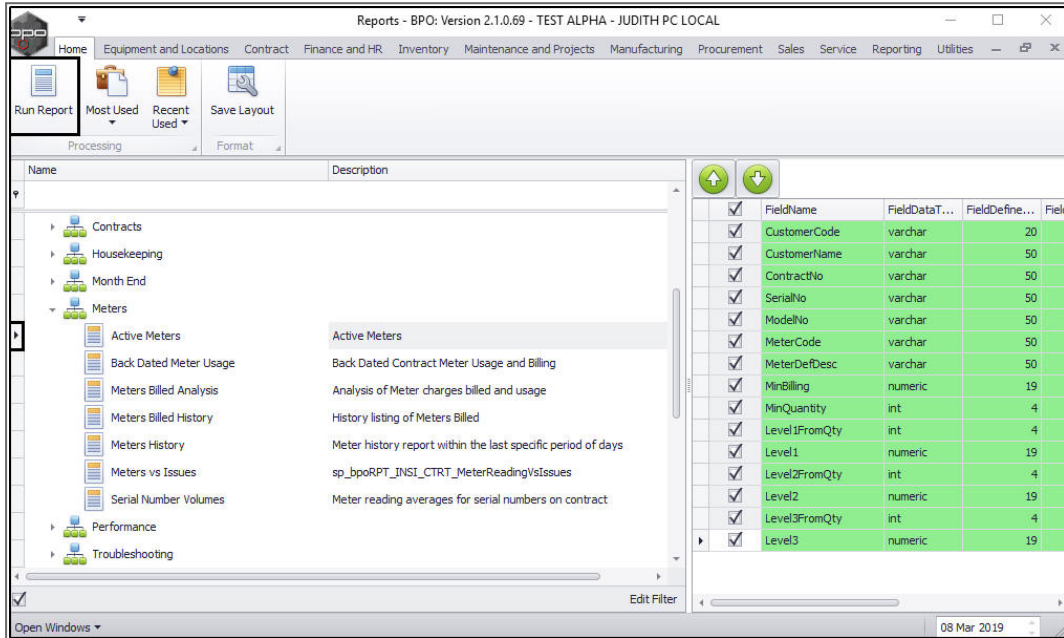
Ribbon Select **Reporting > All Reports**



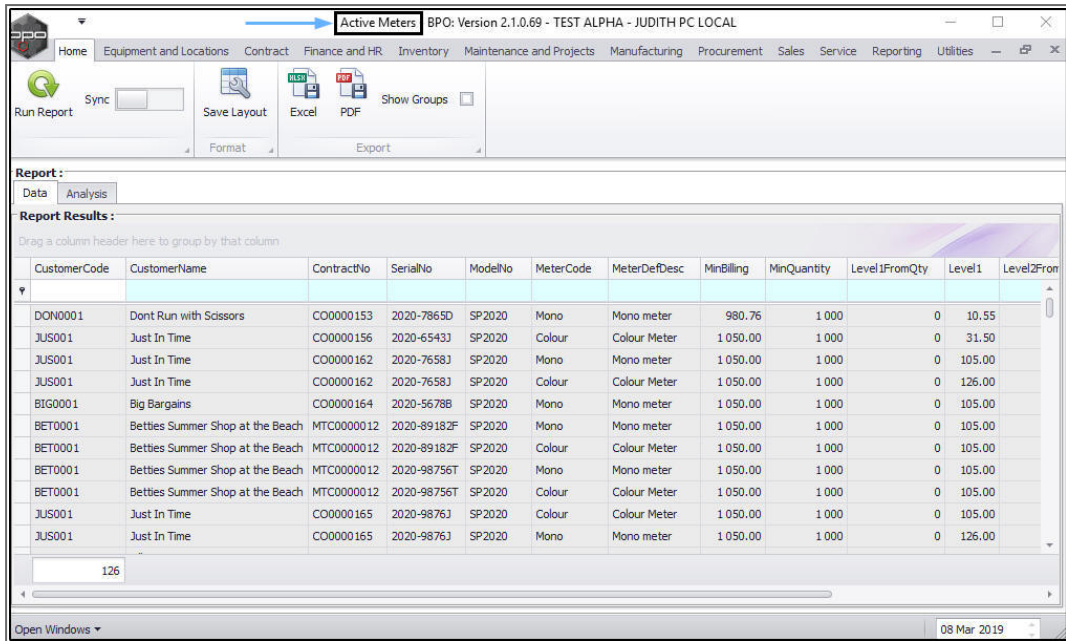
The **Reports** screen will be displayed.

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**.

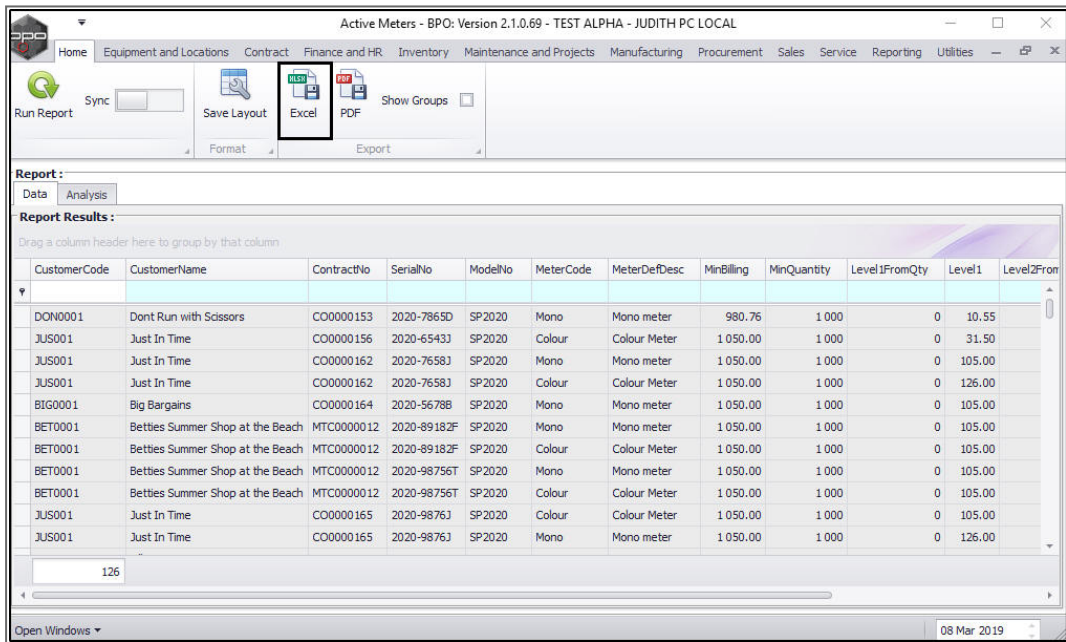


- The report screen specific to the selected report will be displayed.
 - In this image, the **Active Meters** screen has been displayed.



EXPORT REPORT TO EXCEL

- Click on **Excel**.



- 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
1	CustomerCode	CustomerName	ContractN	SerialNo	Modell	MeterCoc	MeterDefDi	MinBilling	MinQuant	Level1FromQ	Level1	Lev
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	MTC0000011	2020-89182F	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
8	BET0001	Betties Summer Shop at the Beach	MTC0000011	2020-89182F	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	
9	BET0001	Betties Summer Shop at the Beach	MTC0000011	2020-98756F	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
10	BET0001	Betties Summer Shop at the Beach	MTC0000011	2020-98756F	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**

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	2020-89182F	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	

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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

1 / 12 | 87.3%

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

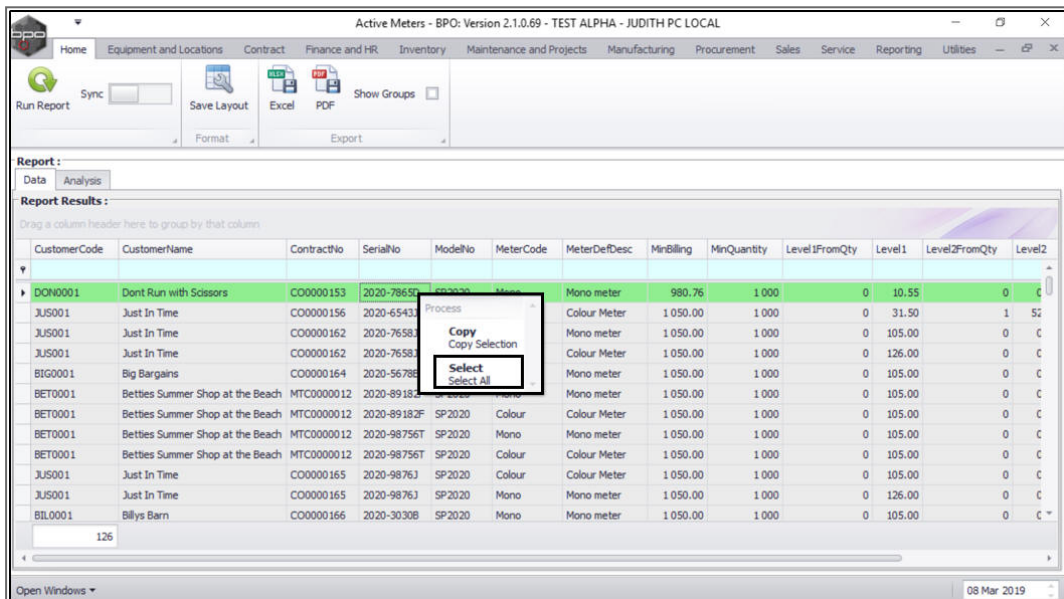
To select **all** data in the data grid:

Either,

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

Or,

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



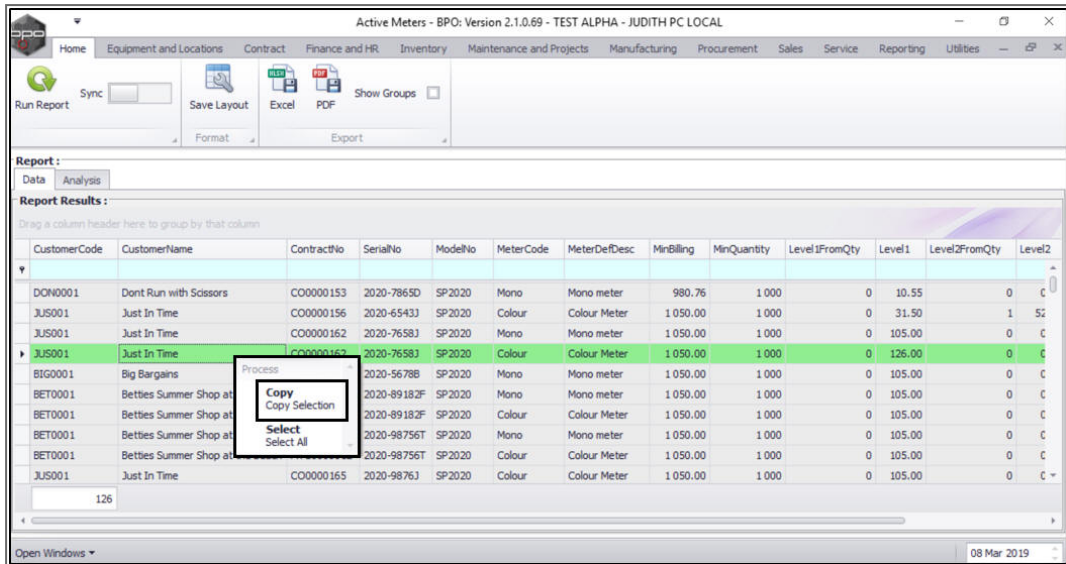
To copy **selected** data in the data grid,

Either,

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

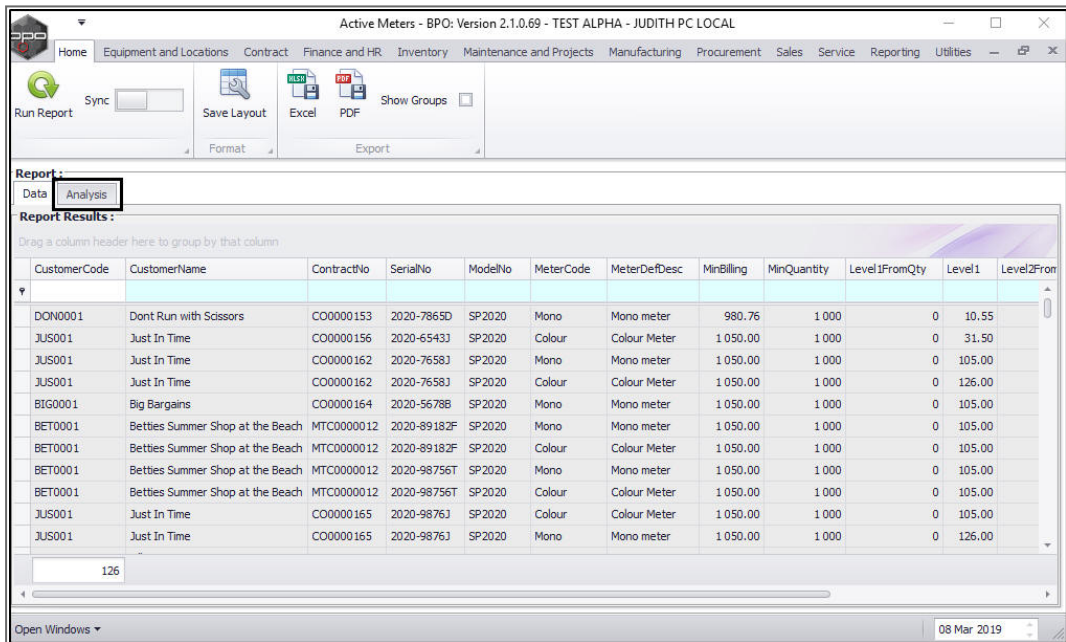
or,

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



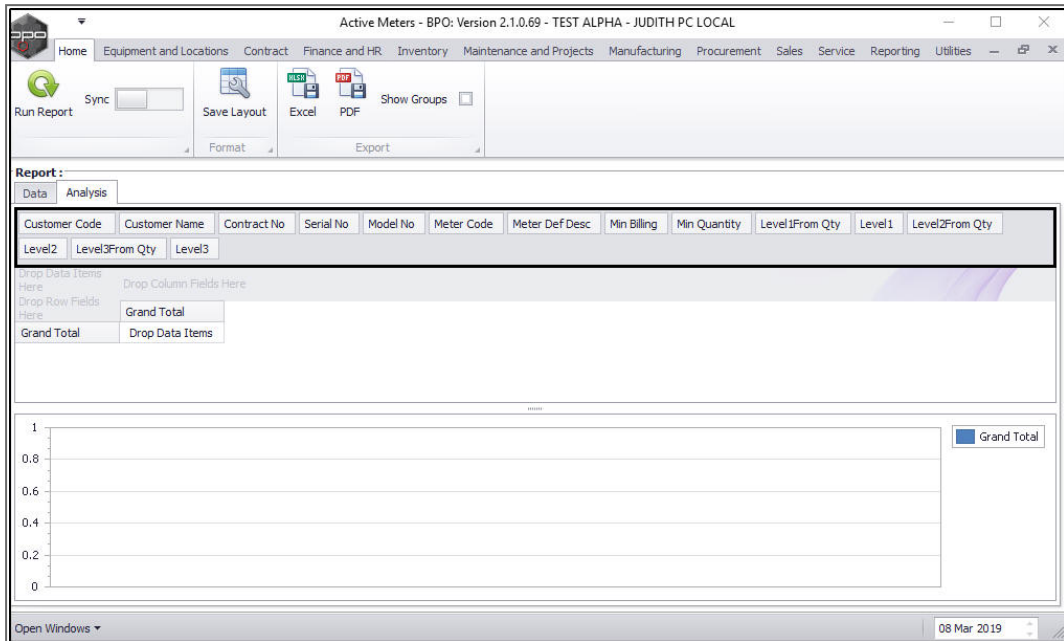
CREATE PIVOT CHART

- 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.



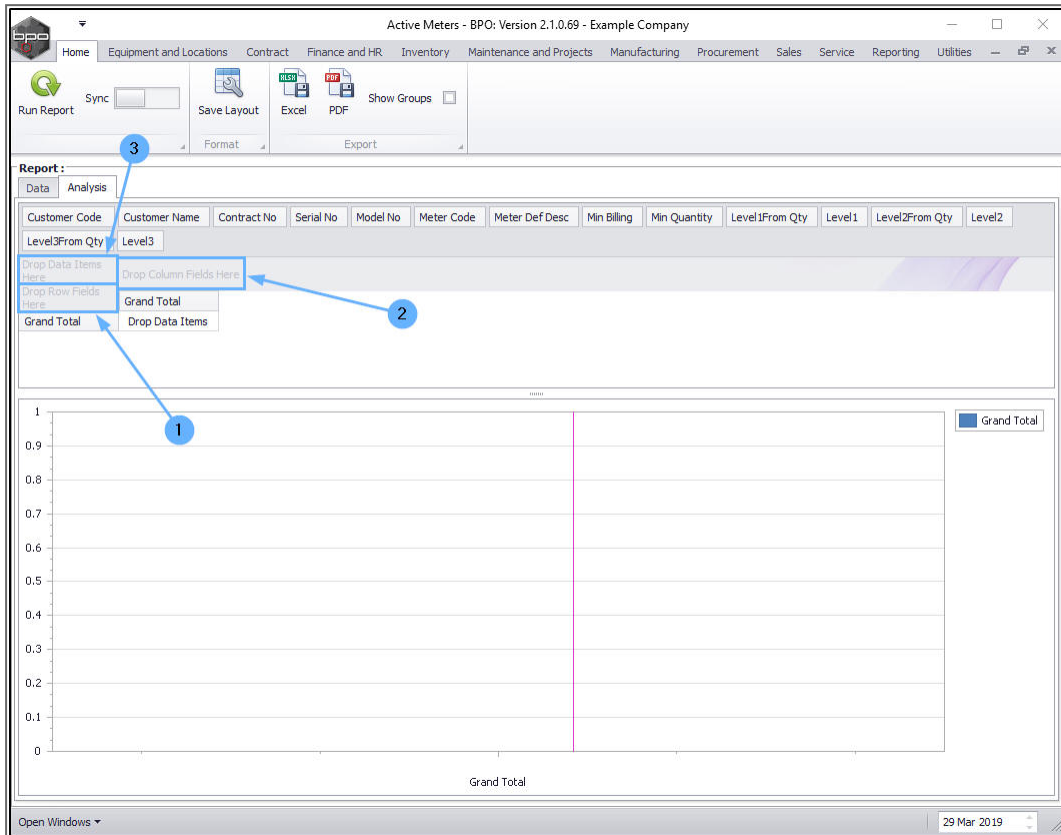
SELECTING COLUMNS FOR THE PIVOT CHART

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.

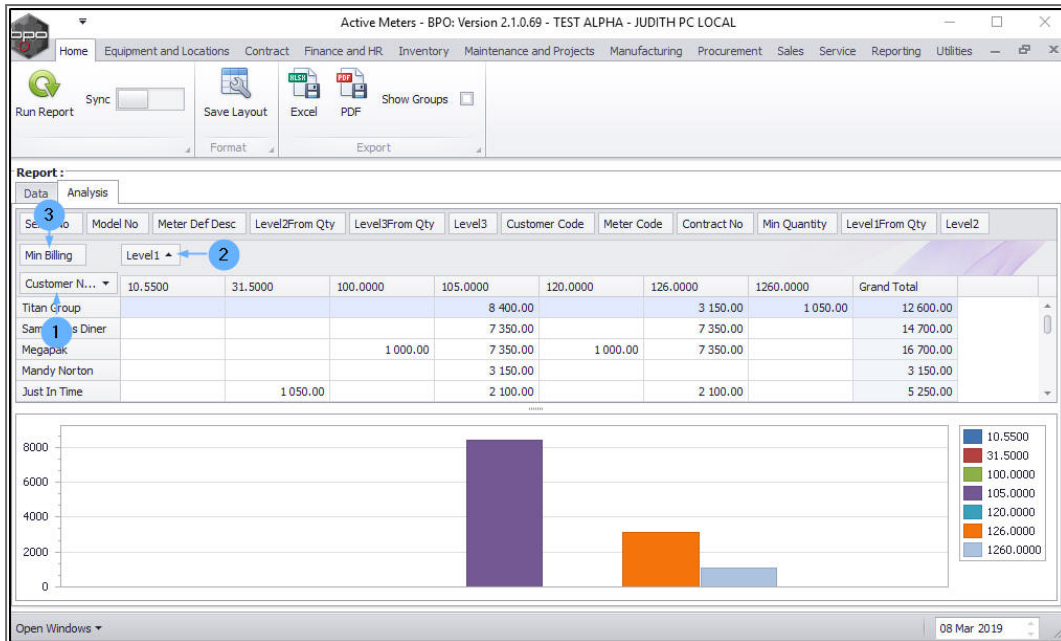
Note 1: It is **not** mandatory to drop columns in all 3 fields, for example you can drop columns in **Row** field and **Data** field but leave out the **Column** field.

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

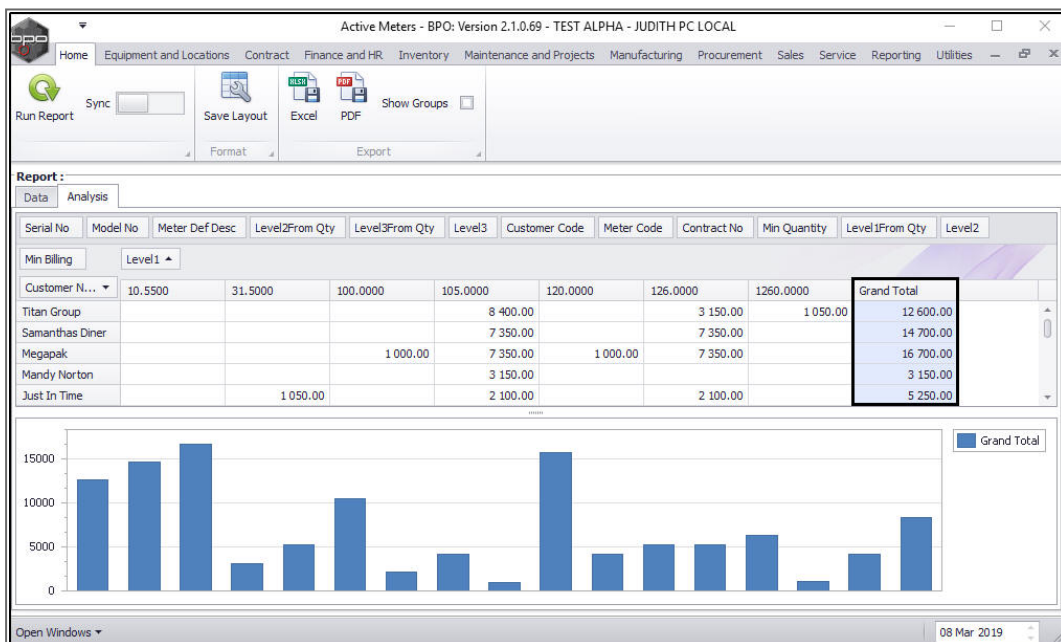


In this example,

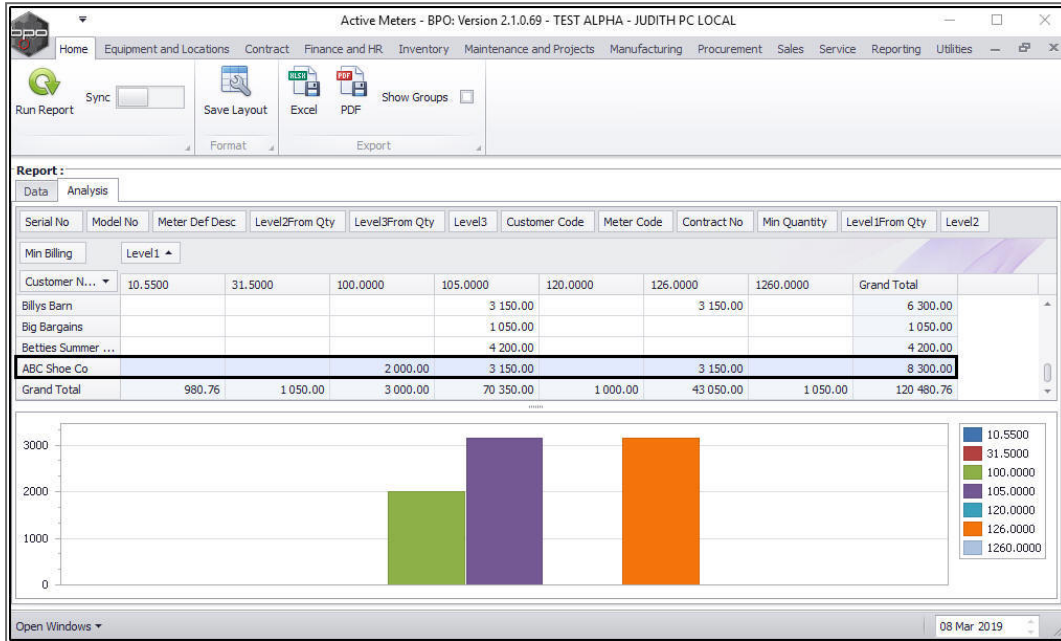
1. **Customer Name** has been dropped in the **Row** field,
2. **Level 1** has been dropped in the **Column** field and
3. **Min Billing** has been dropped in the **Data** field.



- 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

FEEDBACK



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02 July, 2024

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Status:

Software Version:

Date: