

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



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

	Ŧ			BPO: Versior	1 2.1.0.69 - TEST ALPHA - JU	DITH PC LOCAL				-		\times
0	Equipment and Locations	Contract	Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
All Report												
	view											
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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.

		Reports - BPO: Version 2.1.0.69 - TEST ALPH	A - JUDITH PC L	OCAL			<u> 1955</u>		\times
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- The report screen specific to the selected report will be displayed.
 - In this image, the **Active Meters** screen has been displayed.



Q	Home Equ	pment and Locations Contract I		Inventory	Maintenanc	e and Projects	Manufacturing	Procurement	Sales Servi	ice Reporting	Utilities -	- 8
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	DON0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono	Mono meter	980.76	1 000	(10.55	
	JUS001	Just In Time	CO0000156	2020-65433	SP2020	Colour	Colour Meter	1 050.00	1 000		31.50	
	JUS001	Just In Time	CO0000162	2020-76583	SP2020	Mono	Mono meter	1 050.00	1 000	(105.00	
	JUS001	Just In Time	CO0000162	2020-76583	SP2020	Colour	Colour Meter	1 050.00	1 000	(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	(105.00	
	BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Colour	Colour Meter	1 050.00	1 000	(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	(105.00	
	JUS001	Just In Time	CO0000165	2020-98763	SP2020	Colour	Colour Meter	1 050.00	1 000	(105.00	
	JUS001	Just In Time	CO0000165	2020-98763	SP2020	Mono	Mono meter	1 050.00	1 000		126.00	
	126	*										

EXPORT REPORT TO EXCEL

po						PHA - JUDITH PC						×
Home Equ	ipment and Locations Contract I	Finance and HR	Inventory	Maintenano	e and Projects	Manufacturing	Procurement	Sales Serv	ice Reporting	Utilities -	- 8	
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CustomerCode	CustomerName	ContractNo	SerialNo	ModelNo	MeterCode	MeterDefDesc	MinBilling	MinQuantity	Level 1FromQty	Level1	Level2F	Fr
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DON0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono	Mono meter	980.76	1 000	1	0 10.55		
JUS001	Just In Time	CO0000156	2020-65433	SP2020	Colour	Colour Meter	1 050.00	1 000	1	31.50		
JUS001	Just In Time	CO0000162	2020-76583	SP2020	Mono	Mono meter	1 050.00	1 000		105.00		
JUS001	Just In Time	CO0000162	2020-76583	SP2020	Colour	Colour Meter	1 050.00	1 000		126.00		
BIG0001	Big Bargains	CO0000164	2020-56788	SP2020	Mono	Mono meter	1 050.00	1 000	1	105.00		
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Mono	Mono meter	1 050.00	1 000	1	105.00		
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Colour	Colour Meter	1 050.00	1 000		105.00		
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Mono	Mono meter	1 050.00	1 000)	105.00		
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Colour	Colour Meter	1 050.00	1 000		105.00		
JUS001	Just In Time	CO0000165	2020-98763	SP2020	Colour	Colour Meter	1 050.00	1 000	1	105.00		
JUS001	Just In Time	CO0000165	2020-98763	SP2020	Mono	Mono meter	1 050.00	1 000	1	126.00		
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• 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.

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2	DON0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono	Mono meter	980.76	1 000	0	10.55	i -
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	2020-89182	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00)
8	BET0001	Betties Summer Shop at the Beach	MTC000001	2020-89182	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00)
9	BET0001	Betties Summer Shop at the Beach	MTC000001	2020-987561	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
10	BET0001	Betties Summer Shop at the Beach	MTC000001	2020-987561	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) ,
्	> Sheet	+					÷ •			,		•

EXPORT REPORT TO PDF

• Click on PDF



50	Home Equi	oment and Locations Contract F	Finance and HR	Inventory	Maintenano	e and Projects	Manufacturing	Progurement	Sales Servi	ice Reporting	Utilities -	- 8
Con Re	Sync	Save Layout	à 🐴	Show Groups [er reporting		
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Drag a	rt Results :	here to group by that column	ContractNo	SerialNo	ModelNo	MeterCode	MeterDefDesc	MinBilling	MinQuantity	Level 1FromOty	Level 1	Level2F
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	N0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono	Mono meter	980,76	1 000	(0 10.55	
JUS	5001	Just In Time	CO0000156	2020-65433	SP2020	Colour	Colour Meter	1 050.00	1 000	(0 31.50	
JUS	5001	Just In Time	CO0000162	2020-76583	SP2020	Mono	Mono meter	1 050.00	1 000	(105.00	
JUS	5001	Just In Time	CO0000162	2020-76583	SP2020	Colour	Colour Meter	1 050.00	1 000	(126.00	
BIG	0001	Big Bargains	CO0000164	2020-5678B	SP2020	Mono	Mono meter	1 050.00	1 000	(105.00	
BE	0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Mono	Mono meter	1 050.00	1 000	(105.00	
BET	0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Colour	Colour Meter	1 050.00	1 000	(0 105.00	
BET	0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	
BET	0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Colour	Colour Meter	1 050.00	1 000	(105.00	
JUS	5001	Just In Time	CO0000165	2020-98763	SP2020	Colour	Colour Meter	1 050.00	1 000		0 105.00	
JUS	5001	Just In Time	CO0000165	2020-98763	SP2020	Mono	Mono meter	1 050.00	1 000	(126.00	
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• The data from the data grid will be displayed in the **PDF Reader**.

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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	2020-65433	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		

• You can then save, view, print the data etc. as required.



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.

			Active Meters	- BPO: Vers	ion 2.1.0.69 - 1	TEST ALPHA - JUI	DITH PC LOC	AL			- 0	4	×
Home E	quipment and Locations Contract	Finance an	d HR Inven	tory Mai	ntenance and P	rojects Manufa	icturing Pr	ocurement S	ales Service	Reporting	Utilities -	- 67	10 (
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CustomerCode	CustomerName	ContractNo	SerialNo	ModelNo	MeterCode	MeterDefDesc	MinBilling	MinQuantity	Level 1FromQty	Level1	Level2FromQty	Leve	el2
r													_
DON0001	Dont Run with Scissors	CO0000153	2020-78650	000003	Mana	Mono meter	980.76	1 000	0	10.55		0	C
JUS001	Just In Time	CO0000156	2020-65433	Process	_	Colour Meter	1 050.00	1 000	0	31.50		1 5	52
JUS001	Just In Time	CO0000162	2020-76583	Copy Copy S	election	Mono meter	1 050.00	1 000	0	105.00		0	C
JUS001	Just In Time	CO0000162	2020-76583	-		Colour Meter	1 050.00	1 000	0	126.00		0	C
BIG0001	Big Bargains	CO0000164	2020-56788	Select /		Mono meter	1 050.00	1 000	0	105.00		0	C
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182		TIONO	Mono meter	1 050.00	1 000	0	105.00		0	C
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Colour	Colour Meter	1 050.00	1 000	(105.00		0	C
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00		0	c
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00		0	C
JUS001	Just In Time	CO0000165	2020-98763	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00		0	с
JUS001	Just In Time	CO0000165	2020-98763	SP2020	Mono	Mono meter	1 050.00	1 000	(126.00		0	c
BIL0001	Billys Barn	CO0000166	2020-30308	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00		0	c
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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.



Pivot and Export

Home 8	Equipment and Locations Cont	ract Finance ar	nd HR Invent	tory Mai	ntenance and P	rojects Manufa	cturing Pr	ocurement S	ales Service	Reporting	Utilities -	8
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CustomerCode	CustomerName	ContractNo	SerialNo	ModelNo	MeterCode	MeterDefDesc	MinBilling	MinQuantity	Level 1FromQty	Level1	Level2FromQty	Level
DON0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono	Mono meter	980.76	1 000	0	10.55	0	C
JUS001	Just In Time	CO0000156	2020-65433	SP2020	Colour	Colour Meter	1 050.00	1 000	0	31.50	1	52
JUS001	Just In Time	CO0000162	2020-76583	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	0	6
3US001	Just In Time	C00000162	2020-76583	SP2020	Colour	Colour Meter	1 050.00	1 000	0	126.00	0	
BIG0001	Big Bargains Proce	455	2020-56788	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	0	0
BET0001	Betties Summer Shop at	Сору	2020-89182F	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	0	C
BET0001	Betties Summer Shop at	Copy Selection	2020-89182F	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	0	C
BET0001		Select All	2020-98756T	SP2020	Mono	Mono meter	1 050.00	1 000	0	105.00	0	C
BET0001	Betties Summer Shop at		2020-98756T	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	0	C
JUS001	Just In Time	CO0000165	2020-98763	SP2020	Colour	Colour Meter	1 050.00	1 000	0	105.00	0	C
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CREATE PIVOT CHART

• Click on the **Analysis** tab.

Home Equ	ipment and Locations Contract F	Finance and HR	Inventory	Maintenanc	e and Projects	Manufacturing	Procurement	Sales Serv	ice Reporting	Utilities -	- 8	
Sync Sync	Save Layout Exc											
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CustomerCode	CustomerName	ContractNo	SerialNo	ModelNo	MeterCode	MeterDefDesc	MinBilling	MinQuantity	Level 1FromQty	Level1	Level2	2Fr
DON0001	Dont Run with Scissors	CO0000153	2020-7865D	SP2020	Mono	Mono meter	980.76	1 000	1	10.55		
JUS001	Just In Time	CO0000156	2020-65433	SP2020	Colour	Colour Meter	1 050.00	1 000		31.50		
JUS001	Just In Time	CO0000162	2020-76583	SP2020	Mono	Mono meter	1 050.00	1 000		105.00		
JUS001	Just In Time	CO0000162	2020-76583	SP2020	Colour	Colour Meter	1 050.00	1 000		126.00		
BIG0001	Big Bargains	CO0000164	2020-5678B	SP2020	Mono	Mono meter	1 050.00	1 000	1	105.00		
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Mono	Mono meter	1 050.00	1 000	3	105.00		
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-89182F	SP2020	Colour	Colour Meter	1 050.00	1 000		105.00		
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Mono	Mono meter	1 050.00	1 000		105.00		
BET0001	Betties Summer Shop at the Beach	MTC0000012	2020-98756T	SP2020	Colour	Colour Meter	1 050.00	1 000		105.00		
JUS001	Just In Time	CO0000165	2020-98763	SP2020	Colour	Colour Meter	1 050.00	1 000		105.00		
JUS001	Just In Time	CO0000165	2020-98763	SP2020	Mono	Mono meter	1 050.00	1 000)	126.00		
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• 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.

			Act	ive Meters -	BPO: Version	2.1.0.69 - TEST AL	PHA - JUDITH	PC LOCAL				1000		×
Home Equipart Sync			Excel PDF	Show Gro		nance and Projects	Manufacturing	g Procurement	t Sales	Service	Reporting	Utilities	-	₽×
Report : Data Analysis														
Customer Code Level2 Level3Fr	Customer Name om Qty Level3	Contract No	Serial No	Model No	Meter Code	Meter Def Desc	Min Billing	Min Quantity	Level 1Fro	m Qty	Level1 Lev	vel2From Q	ty	
Drop Data Items Here Drop Row Fields	Drop Column Fields	Here										1	11	
Grand Total	Drop Data Items													
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0.8													Grand 1	otal
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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.
- 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.

Active Meters - BPO: Version 2.1.0.69 - Example Company		×
Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Run Report Sync Save Layout Excel PDF Show Groups Excel PDF	Utilities — 🖻	X
3 4 Format Export Report:		
Customer Code Customer Name Contract No Serial No Model No Meter Code Meter Def Desc Min Billing Min Quantity Level3From Qty Level3 Level3From Qty Level3	Qty Level2	
Drop Data Items Here Drop Column Fields Here		
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0.3		
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0.1 -	_	
Grand Total		
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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.



Home Equipment and Locations Contract Finance and HR Inventory Mail Image: Sync Im	el3 Customer Code Met	eter Code Contract No Min 126.0000 1260 3 150.00 7 350.00	Sales Service Rep in Quantity Level 1Fr 0.0000 Grand 1 050.00	rom Qty Level2	- 8
Eport: Data Analysis Se 3 o Model No Meter Def Desc Level2From Qty Level3From Qty Level Min Billing Level1 - 2 2 2 2 105.000	1000 120.0000 8 400.00 7 350.00 7 350.00 1000	126.0000 1260 3 150.00 7 350.00	0.0000 Grand	1 Total 12 600.00 14 700.00	17
So Model No Meter Def Desc Level2From Qty Level3From Qty	1000 120.0000 8 400.00 7 350.00 7 350.00 1000	126.0000 1260 3 150.00 7 350.00	0.0000 Grand	1 Total 12 600.00 14 700.00	17
Customer N	8 400.00 7 350.00 7 350.00 1 000	3 150.00 7 350.00		12 600.00 14 700.00	
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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.

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

RELATED TOPICS

- Introduction to All Reports
- <u>Report View</u>



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