

Using Standard Reports

15/07/2025 2:26 pm BST

Summary

The standard report screen is a hub of reports which are available in multiple formats to be used for analysis, metric reporting and accounting.

Details

The screenshot shows the 'Standard Reports' interface. At the top, there are two tabs: 'Standard Reports' (active) and 'Report Wizard'. Below the tabs, there are several filter fields: 'Date From' (16/06/2025), 'Date To' (15/07/2025), 'Work Location' ([All]), 'Client Site' (Esher SA), 'Client Category' ([All]), and 'Report Category' (Accounting). There is also a 'Report Format' dropdown set to 'PDF'. Below these, there are buttons for 'Select Favourite' and 'Select Recent'. At the bottom, there is an 'Accounting Report' dropdown and a 'Run Report' button. On the right side, there is a 'Report Description' box with the text 'No report selected.'

Running a Standard Report

1. Navigate to Reports from the Primary Navigation on the left-hand side.
2. The Standard Reports tab is displayed.
3. Specify the criteria you wish to filter by for the report:

Date From and To = Filter by dates.

Client Category = The Client Category assigned to a user at registration.

Work Location = The logged in site a transaction took place.

Client Site = The Client's registered site.

4. Select a Report Category (For example, to run an accounting report, select the category 'Accounting').
5. Select a Report Format (PDF or Excel).
6. Select the report you wish to run from the drop-down list and select 'Run Report'.

Report Definitions

When selecting a Standard report from the list, you are provided with a brief description of what the report contains.

Report Format: PDF

Select Favourite Select Recent

Monthend Report Turnover by Treatment Category - Summary By Invoice Da Run Report

Report Description
Shows turnover by Treatment Code Category between the dates specified.
Date: Invoice Date.
Note: This report is designed to run for one month only.

Favouriting Reports

You have the ability to favourite a report, this feature is by user.

Report

Standard Reports Report Wizard

Date From: 16/06/2025 Work Location: [All]

Date To: 15/07/2025 Client Site: Esher SA

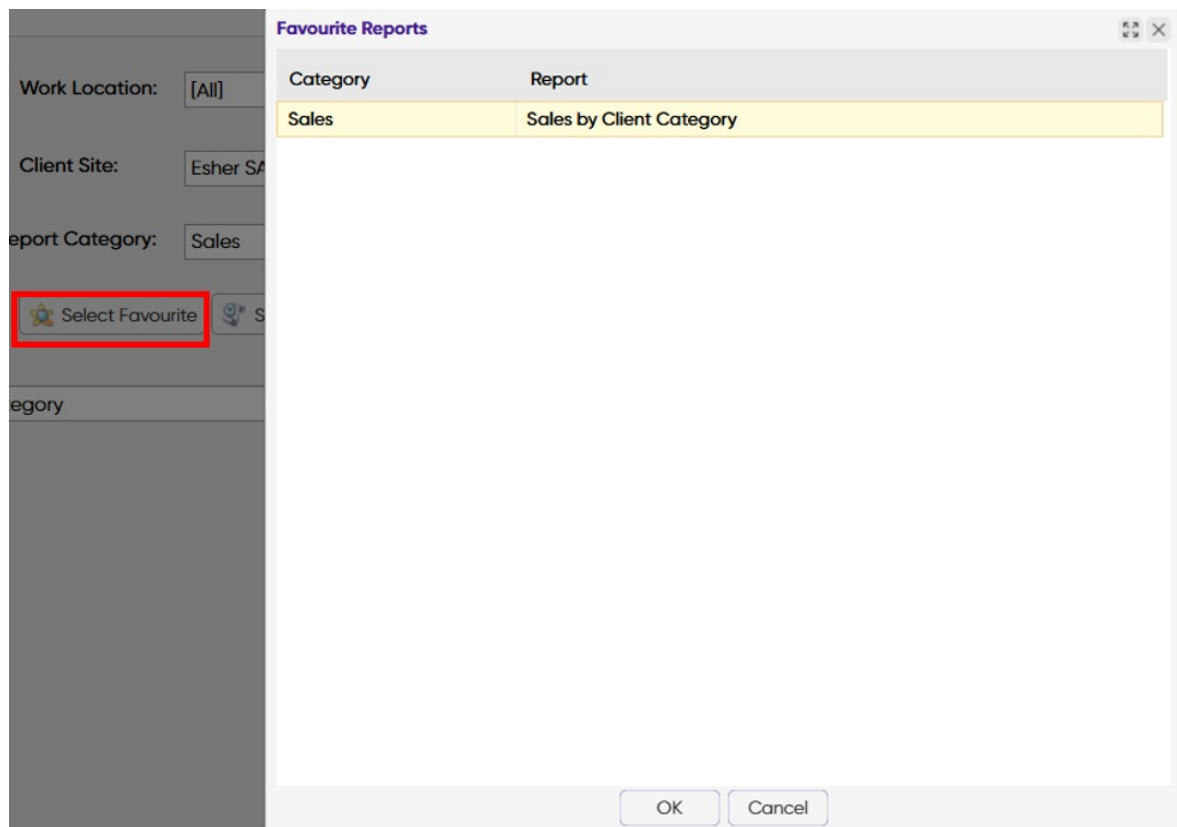
Client Category: [All] Report Category: Sales

Report Format: PDF Select Favourite Select Recent

Sales Report Sales by Client Run Report

When you have the report that you wish to favourite, next to the Run Report button there will be a grey star. Once you select this star it will turn gold. To unfavourite the report, re click the star. Users can have a total of 10 favourites..

When you go back into reports you can click on the Select Favourite button and a pop up with all the favoured reports. just select the one you which to show and click OK



There's also a Select Recent report button which will show you the last 10 reports accessed.

For a more detailed description of our Standard reports, we have categorised and documented these reports which can be accessed via the page ['Summary of Standard Reports'](#).