Reports in 1place

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Reports in 1place - Overview

Reports in 1place

The Reports module in 1place allows you to generate detailed reports across every key area of your operation—sales, purchases, inventory, customers, vendors, and more. Whether you're tracking orders, reconciling daily sales, or reviewing customer activity, reports help you get the data you need in a structured, flexible format.

Navigating Report Categories

In the Reports section, reports are organized into categories for easier access:

- All Reports – View every available report
- My Favorites – Access reports you've marked as favorites
- Frequently Run – Quickly find reports you run often
- Custom Reports – Run reports you've customized and saved

Additional categories include:

- Customers
- Vendors
- Items
- Quotations
- Sales Orders
- Invoices/Credits
- AR / Collections
- Sales Taxes
- Purchase Orders
- Jobs
- Tasks

Running a Report

To run a report in 1place:

1. Select a report from any category (e.g., Sales Orders by Vendor by Date).

2. Set your Report Criteria:

    - Customer: Choose a specific customer or leave as All

    - Group By: Group data by customer, vendor, item, etc. (optional)

    - Sort By: Select how the data should be sorted (e.g., ascending by date)

    - Show Detail: Toggle to include or exclude line item details

    - Warehouse: Select a specific warehouse or All

3. Set the Report Period:
    - Choose a preset option like This Month
    - Or manually enter a date range (e.g., 08/01/2025 to 08/31/2025)
4. Click Run Report to generate results.

List of Existing Reports

Customers

- Customer
- Customers (Date Added)

Vendors

- Vendors

Items

- Inventory Count Sheet (By Category / SubCategory with Fixed Bin Locations
- Inventory Count Sheet (By Fixed Bin Locations)
- Inventory Count Sheet (By Item Receipt Bin locations)
- Inventory Stock Transfers - InvoicesInventory Stock Transfers - Others
- Inventory Valuation - Current (Category / Subcategory)
- Inventory Valuation - Historical
- Item Adjustments
- Item Catalog
- Items
- Items (Date Added)
- Items (Inventory)
- Items StockItems
- VendorsTotal
- Sales By Item (Ascending Order)
- Total Sales By Item (Best to Worst Qty)
- Total Sales By Item (Best to Worst)

Quotations

- Quotations
- Quotations By Customer
- Quotations By Date
- Quotations Line Items

Sales Orders

- Sales - End of Day Reconciliation
- Sales Order by Vendor by Date
- Sales Orders
- Sales Orders - Back Order
- Sales Orders - Totals Per Day

- Sales Orders By Customer
- Sales Orders by Customer by Vendor
- Sales Orders By Date
- Sales Orders by Vendor
- Sales Orders by Vendor - Back Orders
- Sales Orders by Vendor - Totals Per Day
- Sales Orders Line Items
- Sales Orders Line Items by Vendor

Invoices/Credits

- Invoice / Credit Payments Details
- Invoices / Credits
- Invoices / Credits by Category
- Invoices / Credits by Customer
- Invoices / Credits by Customer (Open)
- Invoices / Credits by Customer (Ship To), Item Totals
- Invoices / Credits by Customer, Item Vendor
- Invoices / Credits by Date (Details)
- Invoices / Credits by Date (Totals)
- Invoices / Credits by Item
- Invoices / Credits by Item (w/ Item Qtys)
- Invoices / Credits by Item Vendor, Customer
- Invoices / Credits by Month (Totals)
- Invoices / Credits by Product
- Invoices / Credits by Sales Rep (By Orders)
- Invoices / Credits by Sales Rep (Details)
- Invoices / Credits by Sales Rep (Totals)
- Invoices / Credits by Sales Rep, By Customer
- Invoices / Credits by Type
- Invoices / Credits Entered By Person (Totals)
- Invoices / Credits Line Items
- Invoices / Credits Line Items by Vendor, Invoice Item
- Sales History - 2 Year Comparison by Customer (Alpha)
- Sales History - 2 Year Comparison by Customer (Best to Worst)
- Sales History - 2 Year Comparison by Item (Alpha)
- Sales History - 2 Year Comparison by Item (Best to Worst)

AR/Collections

- AR - Payments Received
- AR - Payments Received (End of Day)

Sales Taxes

- Sales Tax Liability - Detail
- Sales Tax Liability - Summary

Purchase Orders

- Purchase Order Special Orders
- Purchase Orders

- Purchase Orders by Date
- Purchase Orders by Vendor
- Purchase Orders Line Items

Jobs

- Jobs
- Jobs Task & Email

Tasks

- Billable Time
- Tasks

Exception Reports

- Customers (with Balances) in 1place NOT in QuickBooks Online
- Inventory Levels
- Invoices / Credit Memos Edited (Header / Footer)
- Invoices / Credit Memos Edited (Line Items)
- Invoices/Credits Deleted
- Payments - Deleted
- Purchase Orders - Deleted
- Purchase Orders - Edited (Line Items)
- Sales Exception - Items Not Sold
- Sales Order - Edited (Line Items)
- Sales Order Item Price Changes
- Sales Orders - Edited (Header / Footer)
- Sales Orders Deleted

Tips for Using Reports Effectively

- Save frequently used reports to My Favorites for quick access.
- Use "Group By" and "Sort By" to organize data in ways that are meaningful to your team.
- Explore Custom Reports if you need something more tailored than the default options.

Reports - Common Task

Exporting Reports (PDF & Excel)

You can export any report in **PDF or Excel format** for easy sharing, printing, or further analysis.

To export a report:

1. **Run the report** you'd like to export.

2. In the upper-right corner of the report screen, look for the **Export icon** (next to the gear/settings icon).

3. Click the **Export button** and choose your preferred format:

    - **PDF**

    - **Excel**

4. The export will begin downloading automatically through your **browser**.

5. Check your **Downloads folder** for the exported file.

Tip: Exporting to Excel is useful if you want to sort, filter, or manipulate the data further.

How Do I Show or Hide Columns in a Report?

You can **customize which columns are visible** in a report to better focus on the information you need.

Here's how:

1. Run the **report** you want to view.

2. Click the **gear icon** located in the upper-right corner of the report screen.

3. The **Report Lists Settings** panel will appear.

4. Use the **checkboxes** to show or hide specific columns as needed.

5. After making your selections, click the **Apply button** to update the report view.

Changes will be reflected immediately—no need to re-run the report.

How Do I Create a Customized Version of a Report?

If you frequently run a report with the same settings or need a specific layout, you can save a **customized version** for quick access later.

To create a customized report:

1. Run the **base report** you want to customize.

2. Click the **gear icon** in the upper-right corner of the report screen.

3. The **Report Lists Settings** panel will open.

4. Click the **Customize button** at the bottom of the panel.

5. In the **Customize Report popup**, fill in the following details:

    - **Report Category** – This is auto-filled based on the base report you're customizing.

    - **Min Access Level** – Choose who can access this custom report (e.g., Admin only, All Users).

    - **Report Name** – Enter a name for your customized report.

    - **Report Description** – Add a brief description for clarity.

    - **Make Report Private** – Enable this if you want the report to be visible only to you.

    - **Favorite** – Check this to add the report to your Favorites list.

6. Use the **Show/Hide Columns** options to include only the data you want to see.

7. Click Save to save your customized report.

Your new custom report will now appear under the **Custom Reports category**—and in **Favorites** if tagged.

Tip: Custom reports are great for recurring tasks, like monthly summaries or vendor-specific views.

Reports Security Settings

User Report Security Settings

The User Reports Security Settings feature allows administrators to control which reports each user can access. This ensures that sensitive or irrelevant information is only visible to the appropriate individuals—giving you better control over data visibility across roles and departments.

How to Access User Reports Security Settings

- Click the **gear icon** in the upper-right corner of 1place (beside your username).
- Select **Settings** from the dropdown.
- Under **Setting Type**, choose **Users.**
- Locate the user you want to update, then click the **edit icon (pencil)** beside their name.
- Go to the **Report Security** tab.

Setting Report Access

Within the **Report Security tab**, you'll see a section labeled:
"Reports this user can view:"
Here, you can choose one of the following options:

- **ALL** – User can view all available reports.
- **NONE** – User cannot view any reports.
- **SELECTED** – User can view only selected reports. If you select SELECTED, a dropdown menu will appear, allowing you to pick which specific reports the user can access. Simply click the dropdown and check the boxes beside the reports you'd like to enable.