How to Print or Download Reports

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Overview

Use reports in 1place to review business activity, prepare information for a meeting, or provide supporting records for accounting and operational tasks.

This guide explains how to generate a report, review its contents, and print or download a copy.

Before You Begin

Identify the information you need and the period it should cover. For example, a monthly sales review may require totals by customer, while an investigation may require individual transaction details.

Your user permissions determine which reports you can access.

Steps

1. Select a Report

Open **Reports** and choose the appropriate category and report. You can also find reports through **All Reports**, **My Favorites**, or **Frequently Run**.

2. Set the Report Criteria

Review the available options, which may include:

- **Customer:** Limit the results to a customer or include all.
- **Warehouse:** Select a location or all warehouses.
- **Group By:** Organize the results into groups.
- **Sort By:** Set the display order.
- **Show Detail:** Include or exclude transaction details.
- **Report Period:** Select a preset period or enter a date range.

Click **Run Report**.

3. Review the Results

Confirm that the report covers the intended period and scope before printing or sharing it.

For example, if you need company-wide sales for the previous month, check that the report includes the correct dates and warehouses.

If the results are unexpected, review the criteria and run the report again.

4. Adjust the Displayed Columns if Needed

Click the **gear** icon in the report's upper-right corner. In **Report Lists Settings**, select or clear the column checkboxes, then click **Apply**.

5. Print or Download the Report

The toolbar in the report's upper-right corner contains four buttons, from left to right:

- **Email (envelope):** Access report emailing.
- **Print (printer):** Access report printing.
- **Download (down arrow):** Download the report.
- **Settings (gear):** Adjust the report's displayed columns.

To print: Click the **printer** icon. Review the available print preview and settings, select your printer and required copies, then complete printing. Check that columns fit on the page and the text is readable.

To download: Click the **download** icon and choose **PDF** or **Excel** from the available options. Locate the file in your browser's downloads list or **Downloads** folder.

Choose **PDF** for a copy to review, print, or share. Choose **Excel** when you need to sort, filter, or analyze the data further.

6. Verify the Output

Check the printed report or downloaded file before using it. Confirm the reporting period, included records, and totals.

When saving the file, use a descriptive name such as **Monthly Sales by Customer – October 2026** so it is easy to identify later.