13.05. Stocktake reports

Stocktake reports enable you to report over multiple stocktakes. If you want detail from a single stocktake, there are several options for reports you can run from within a stocktake, see the 4.17. Stocktakes page for details.

Choose *Report* > *Stocktakes...* from the menu. The report options window opens:



- **From** and **To** dates: Enter the range of dates of stocktake to include in the report. This range will be compared to the *Stocktake date* of a stocktake, not its *created date*. Enter the dates manually, by clicking on the calendar icons or selecting something from the quick range chooser drop down list on the right.
- **Include stocktakes with suggested (sg) status**: If this is checked then lines from stocktakes with suggested status will be included in the report.
- **Include stocktakes with Finalised (fn) status**: If this is checked then lines from stocktakes with finalised status will be included in the report.

When you have entered your various choices, click on the **OK** button to run the report. The report will be created and automatically opened in you spreadsheet application. It looks like this:



The report shows details of all the stocktake lines on stocktakes that match the report filters you selected above. The lines are grouped by stocktake and shown in line number order. What the columns contain:

- **Status**: The status of the stocktake this line came from.
- **Stocktake date**: The stocktske date of the stocktake this line came from.
- **Line number**: This stocktake line's line number.
- **Location**: The location of the stock in this stocktake line.
- **Item code**: The code of the item this line is for.
- **Item name**: The name of the item this line is for.
- **Brand name, Sources of supply and Project**: These are custom stock fields (see the page for details). Any custom stock fields that are turned on will appear here, the column headings will be the names the fields are given in the settings.
- **Snapshot expiry date**:
- **Expiry date**:
- **Snapshot batch**:
- **Batch**:
- **Snapshot packs**:
- **Snapshot quantity**:
- **Stocktake qty**:
- **Snapshot qty units**:
- **Stocktake qty units**:
- **Difference units**:
- **Absolute difference**:

- **Comment**:
- **Reason**:

// Previous: **13.04. Purchasing reports** | Next: **13.06. Requisition reports** //

From:
https://docs.msupply.org.nz/ - **mSupply documentation wiki**

Permanent link:
https://docs.msupply.org.nz/reports:stocktakes?rev=1738758422

Last update: **2025/02/05 12:27**