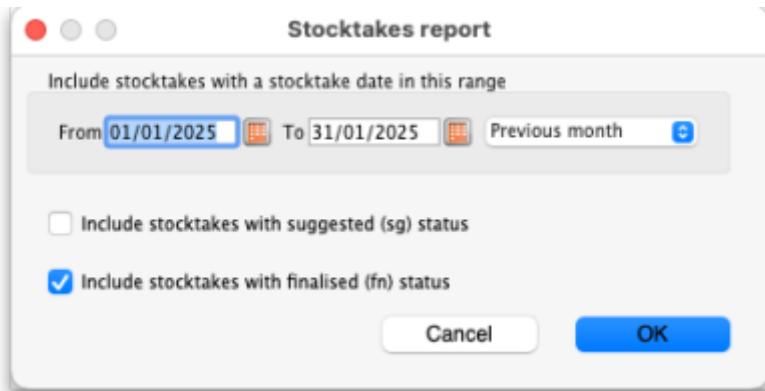


13.05. Stocktake reports



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 your spreadsheet application. It looks like this:

Stocktake		Line number	Location	Item code	Item Name	Brand	Sources of Supply	Project	Snapshot	Snapshot	Snapshot	Snapshot	Stocktake	Difference	Absolute difference	Comment	
Status	Description					Name		expiry date	batch	Batch	Packs	Snapshot	Stocktake	qty units	qty units	qty units	qty units
fn	Physical. Count. (For Nov)	1		B322.10	(Determine Test), EDTA CAPILLARY TUBE, 50µl between two mm	00/00/00		31/12/24	33522	1	124	124	124	124	0	0	
fn	Physical. Count. (For Nov)	2		B322.10	(Determine Test), EDTA CAPILLARY TUBE, 50µl between two mm	00/00/00		31/12/24	33522	1	133	133	133	133	0	0	
fn	Physical. Count. (For Nov)	3		B315.10	CONDOM, male, lubr., 49mm width, natural, WHO/UNFPA Prequel	00/00/00		31/08/28	23MR014	1	14400	14400	14400	14400	0	0	
fn	Physical. Count. (For Nov)	4		B315.10	CONDOM, male, lubr., 49mm width, natural, WHO/UNFPA Prequel	00/00/00		31/08/28	23MR015	1	6600	6600	6600	6600	0	0	
fn	Physical. Count. (For Nov)	5		B315.N3	CONDOM, male, lubr., 53mm width, natural, WHO/UNFPA Prequel	00/00/00		31/01/29	240218	1	21060	21060	21060	21060	0	0	
fn	Physical. Count. (For Nov)	6		B315.18	GLOVE, EXAMINATION, latex, s.u., powdered, non sterile, medium	00/00/00		31/10/26	10671M	1	800	800	800	800	0	0	
fn	Physical. Count. (For Nov)	7		B315.18	GLOVE, EXAMINATION, latex, s.u., powdered, non sterile, medium	00/00/00		31/10/26	10671M	1	1000	1000	1000	1000	0	0	
fn	Physical. Count. (For Nov)	8		B315.18	GLOVE, EXAMINATION, latex, s.u., powdered, non sterile, medium	00/00/00		31/10/26	10650202101	1	35	35	35	35	0	0	
fn	Physical. Count. (For Nov)	9		B322.50	LANCET, steril, for single use, needle 23 G, twist top	00/00/00		30/06/26	230411	1	172	172	172	172	0	0	
fn	Physical. Count. (For Nov)	10		B322.50	LANCET, steril, for single use, needle 23 G, twist top	00/00/00		30/06/26	230411	1	228	228	228	228	0	0	
fn	Physical. Count. (For Nov)	11		B322.N34	LANCET for finger prick (Santostaf Safety lancets, superblade n	00/00/00		31/01/08	D6465047	1	293	293	293	293	0	0	
fn	Physical. Count. (For Nov)	12		B315.30	MASK, SURGICAL, 3 ply, s.u., pe	00/00/00		28/02/07	2221	1	250	250	250	250	0	0	
fn	Physical. Count. (For Nov)	13		B316.34	LUBRICANT GEL, 20 ml, tube, viscosity 025 C 18000 minimum, F	00/00/00		31/07/26	23J4812MNC	1	700	700	700	700	0	0	
fn	Physical. Count. (For Nov)	14		B321.13	TEST, HIV 1 + 2 (Determine), seroplates, rapid, (Ref no: 7D2343) - 1	00/00/00		07/06/25	0000838144	1	465	465	465	465	0	0	
fn	Physical. Count. (For Nov)	15		ALLA2H0013	BAG (envelopes) plastic, for drugs, 10 x 15cm	00/00/00		00/00/00	stocktake_15	1	80	80	80	80	0	0	
fn	Physical. Count. (For Nov)	16		B313.7	COTTON WOOL hydrophilic, roll of 100g, roll	00/00/00		30/09/27	20221001	1	2	2	2	2	0	0	
fn	Physical. Count. (For Nov)	17		B322.20	(Determine test), BUFFER CHASE, for whole blood testing, bot. of	00/00/00		22/10/25	0000006109	1	2	2	2	2	0	0	
fn	Physical. Count. (For Nov)	1		B322.50	LANCET, steril, for single use, needle 23 G, twist top	00/00/00		30/06/28	230411	1	172	172	172	172	0	0	
fn	Physical. Count. (24.11.24)	2		B322.50	LANCET, steril, for single use, needle 23 G, twist top	00/00/00		30/06/28	230411	1	121	128	121	128	107	107	
fn	Physical. Count. (24.11.24)	3		B322.N34	LANCET for finger prick (Santostaf Safety lancets, superblade n	00/00/00		31/01/28	D6465047	1	400	293	400	293	-107	107	
fn	Physical. Count. (20.11.2022)	1		B315.N3	CONDOM, male, lubr., 53mm width, natural, WHO/UNFPA Prequel	00/00/00		31/01/29	240218	1	17000	21060	17000	21060	-4060	4060	
fn	Physical. Count. (20.11.2022)	2		NAPB315.N3	CONDOM, male, lubr., 53mm width, natural, WHO/UNFPA Prequel	00/00/00		00/00/00	stocktake_1f	1	4060	0	4060	0	-4060	4060	

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 stocktake 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:** The values entered for custom stock fields (see the [16.01. General preferences](#) page for details). Any custom stock fields that are turned on will appear here and the column headings will be the names the fields are given in the settings.
- **Snapshot expiry date:** The expiry date for this stocktake line when the stocktake was created. Will be "00/00/00" if the line was added after the stocktake was created.
- **Expiry date:** The expiry date for this stocktake line when the stocktake was finalised (also called the "counted expiry date").
- **Snapshot batch:** The batch of this stocktake line when the stocktake was created. Will be empty if the stockline was added to the stocktake after creation.
- **Batch:** The batch of this stocktake line when the stocktake was finalised (also called the "counted batch").
- **Snapshot packsize:** The packsize (number of units in a pack) for this stocktake line.
- **Snapshot quantity:** The number of packs of this stocktake line when the stocktake was created.
- **Stocktake qty:** The number of packs of this stocktake line when the stocktake was finalised (also called the "counted packs").
- **Snapshot qty units:** The number of units of this stocktake line when the stocktake was created (= *Snapshot packs* x *Snapshot quantity*).
- **Stocktake qty units:** The number of units of this stocktake line when the stocktake was finalised (= *Snapshot packs* x *Stocktake qty*). Also called "counted units".
- **Difference units:** *Stocktake qty units* minus *Snapshot qty units* (can be negative).
- **Absolute difference:** *Difference units* with any negative sign removed.
- **Comment:** The comment entered for this stocktake line.
- **Reason:** Only shown if reasons are being used (see the [16.10. Options \(standard reasons\)](#) page for details) and there is a reason entered for one of the stocktake lines included in this report. The column shows the reason chosen for the difference between *Snapshot quantity* and *Stocktake qty* for this stocktake line.

Previous: [13.04. Purchasing reports](#) | | Next: [13.06. Requisition reports](#)

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