

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/Inventory report 01/01/2024 - 31/12/2024																			
Status	date	Description	Line number	Location	Item code	Item Name	Brand	Sources	Project	Snapshot expiry date	Expiry date	Batch	Snapshot batch	Batch	Snapshot quantity	Snapshot quantity	Stocktake quantity	Stocktake quantity	Absolute difference
fn	24/11/24	Physical Count (For Nov)	1		B322.10	(Determine Test), EDTA CAPILLARY TUBE, 50µl between two ma				00/00/00	31/12/24	33522		33522	1	124	124	124	0
fn	24/11/24	Physical Count (For Nov)	2		B322.10	(Determine Test), EDTA CAPILLARY TUBE, 50µl between two ma				00/00/00	31/12/24	33522		33522	1	133	133	133	0
fn	24/11/24	Physical Count (For Nov)	3		B315.10	CONDOM, male, lubr., 49mm width, natural, WHO/UNFPA Prequi				00/00/00	31/08/28	23MR014		23MR014	1	14400	14400	14400	0
fn	24/11/24	Physical Count (For Nov)	4		B315.10	CONDOM, male, lubr., 49mm width, natural, WHO/UNFPA Prequi				00/00/00	31/08/28	23MR015		23MR015	1	6600	6600	6600	0
fn	24/11/24	Physical Count (For Nov)	5		B315.N3	CONDOM, male, lubr., 53mm width, natural, WHO/UNFPA Prequi				00/00/00	31/01/29	240218		240218	1	21060	21060	21060	0
fn	24/11/24	Physical Count (For Nov)	6		B315.18	GLOVE, EXAMINATION, latex, s.u., powdered, non sterile, mediu				00/00/00	31/10/26	10671M		10671M	1	800	800	800	0
fn	24/11/24	Physical Count (For Nov)	7		B315.18	GLOVE, EXAMINATION, latex, s.u., powdered, non sterile, mediu				00/00/00	31/10/26	10671M		10671M	1	1000	1000	1000	0
fn	24/11/24	Physical Count (For Nov)	8		B312.4	CHLORINE 1g (NaOCC / diethoxyacrylate sodium 1.67g), tab.				00/00/00	31/06/26	100502101		100502101	1	35	35	35	0
fn	24/11/24	Physical Count (For Nov)	9		B322.50	LANCET, sterile, for single use, needle 23 G, twist top.				00/00/00	30/06/28	230411		230411	1	172	172	172	0
fn	24/11/24	Physical Count (For Nov)	10		B322.50	LANCET, sterile, for single use, needle 23 G, twist top.				00/00/00	30/06/28	230411		230411	1	228	228	228	0
fn	24/11/24	Physical Count (For Nov)	11		B322.N34	LANCET for finger pricking (Sarstedt Safety lancets, superblade n				00/00/00	31/01/28	D6A650A7		D6A650A7	1	293	293	293	0
fn	24/11/24	Physical Count (For Nov)	12		B315.30	MASK, SURGICAL, IR type, 3 ply, s.u., pce				00/00/00	28/02/27	2221		2221	1	250	250	250	0
fn	24/11/24	Physical Count (For Nov)	13		B315.24	LUBRICANT GEL, 20 ml, tube, viscosity @25 C 18000 minimum, F				00/00/00	31/07/26	23J44812MC		23J44812MC	1	700	700	700	0
fn	24/11/24	Physical Count (For Nov)	14		B321.13	TEST, HIV 1 + 2 (Determine), seripiw, rapid, (Ref no: 7D2343) - f				00/00/00	07/06/25	0000838144		0000838144	1	465	465	465	0
fn	24/11/24	Physical Count (For Nov)	15		ALLA2H0013	BAG (envelope), plastic, for drugs, 10 x 15cm				00/00/00	00/00/00	stocktake, 11		stocktake, 11	1	80	80	80	0
fn	24/11/24	Physical Count (For Nov)	16		B313.7	COTTON WOOL, hydrophilic, roll of 100g, roll				00/00/00	30/09/27	20221001		20221001	1	2	2	2	0
fn	24/11/24	Physical Count (For Nov)	17		B322.20	(Determine test), BUFFER CHASE, for whole blood testing, bot. of				00/00/00	22/10/25	0000806109		0000806109	1	2	2	2	0
fn	24/11/24	Physical Count (24.11.24)	1		B322.50	LANCET, sterile, for single use, needle 23 G, twist top.				00/00/00	30/06/28	230411		230411	1	172	172	172	0
fn	24/11/24	Physical Count (24.11.24)	2		B322.50	LANCET, sterile, for single use, needle 23 G, twist top.				00/00/00	30/06/28	230411		230411	1	121	228	121	107
fn	24/11/24	Physical Count (24.11.24)	3		B322.N34	LANCET for finger pricking (Sarstedt Safety lancets, superblade n				00/00/00	31/01/28	D6A650A7		D6A650A7	1	400	293	400	-107
fn	20/11/24	Physical Count (20.11.202)	1		B315.N3	CONDOM, male, lubr., 53mm width, natural, WHO/UNFPA Prequi				00/00/00	31/01/29	240218		240218	1	17000	21060	17000	4060
fn	20/11/24	Physical Count (20.11.202)	2		HARBR315.N3	CONDOM, male, lubr., 53mm width, natural, WHO/UNFPA Prequi				00/00/00	00/00/00	stocktake, 11		stocktake, 11	1	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.

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