

## 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:

| 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         | Packs | quantity | qty   | Snapshot Stocktake | Snapshot Stocktake   |
|  |          |                            |             |          |             |   |       |         |         |                      |             |               |                |               |       |          |       | qty units          | Stocktake Difference |
|  |          |                            |             |          |             |   |       |         |         |                      |             |               |                |               |       |          |       | qty units          | Absolute difference  |
|  |          |                            |             |          |             |   |       |         |         |                      |             |               |                |               |       |          |       |                    | Comment              |
| 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 / di(hydroxyacrylate 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), ser/pw, 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:** 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](#)

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