

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	124
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	133
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	14400
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	6600
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	21060
fn	24/11/24	Physical Count (For Nov)	6		B315.18	GLOVE, EXAMINATION, latex, s.u., powdered, non sterile, medi				00/00/00	31/10/26	10671M		10671M	1	800	800	800	800
fn	24/11/24	Physical Count (For Nov)	7		B315.18	GLOVE, EXAMINATION, latex, s.u., powdered, non sterile, medi				00/00/00	31/10/26	10671M		10671M	1	1000	1000	1000	1000
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	1005020101		1005020101	1	36	36	36	36
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	172
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	228
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	293
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	250
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	700
fn	24/11/24	Physical Count (For Nov)	14		B321.13	TEST, HIV 1 + 2 (Determine), ser/pw/b, rapid, (Ref no: 7D2343) - f				00/00/00	07/06/25	0000838144		0000838144	1	465	465	465	465
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	80
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	2
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	2
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	172
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	228
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	293
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	21060
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:**

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

