

Custom Report

Report Module Guide: Custom Report

Module Location

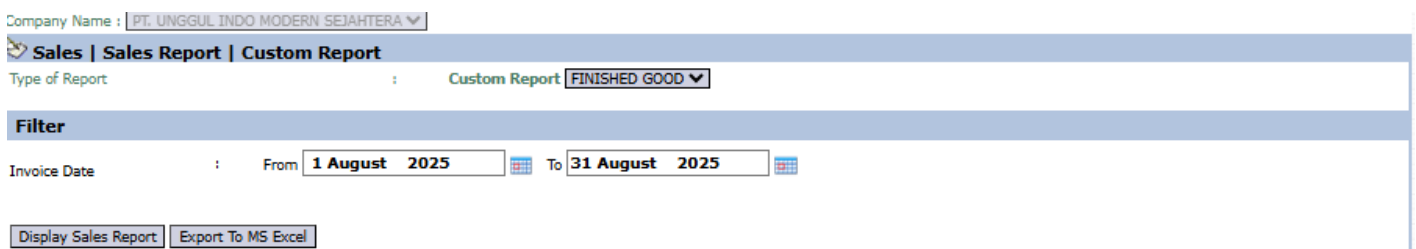
Sales > Reports > Custom Reports

Module Objective

This module, titled **Custom Report** in the system, is used to generate sales reports with specific or custom formats that may not be available in other standard report modules. It is a collection of miscellaneous reports for specific analysis needs.

1. Report Parameters (Filter)

The main page of this module is a form containing several parameters to customize the report that will be generated.



The screenshot shows a web interface for generating a custom report. At the top, the company name is set to 'PT. UNGGUL INDO MODERN SEJAHTERA'. Below this, the breadcrumb navigation is 'Sales | Sales Report | Custom Report'. The 'Type of Report' is set to 'Custom Report' with a dropdown menu showing 'FINISHED GOOD'. A 'Filter' section contains an 'Invoice Date' field with a date range from '1 August 2025' to '31 August 2025'. At the bottom, there are two buttons: 'Display Sales Report' and 'Export To MS Excel'.

Here is an explanation for each parameter:

- **Type of Report:**

- Use this dropdown to select the type of custom report you want to generate (e.g., FINISHED GOOD).

- **Invoice Date:**

- Specify the **From** and **To** date range to define the period of transactions for which data will be pulled (e.g., August 1, 2025, to August 31, 2025).

2. Steps to Generate the Report

Step 1: Set Report Parameters

Define the **Invoice Date** range and select the **Type of Report** you want.

Type of Report : Custom Report FINISHED GOOD ▼

Invoice Date : From 1 August 2025 To 31 August 2025

Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Sales Report:** To preview the report directly on your screen.

Display Sales Report

- **Export To MS Excel:** To download the report data in an Excel file format.

Export To MS Excel

3. Example of the Report View

The generated report will vary depending on the **Type of Report** selected. One example is a summary of sales reports as shown below.



Sales Order Report

08/08/2025 01:40:20

Company	Date Delivery	Date Tax	INVOICE	Net Amount USD	Net Amount IDR	PPN	Due Date
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Report Explanation: This example displays a summary of sales documents within the selected period.

Key Columns:

- **Date Delivery:** The date of delivery.
- **INVOICE:** The invoice reference number.
- **Net Amount:** The net value in USD and IDR currency.
- **PPN:** The Value Added Tax (VAT) amount.
- **Due Date:** The due date.

Tips & Important Notes

- Use this module to access sales reports with specific formats that might not be available in other report modules.
- **Explore the options in the `Type of Report` dropdown** to see other types of custom reports that may be available for your analysis needs.

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